Five9
The Intelligent Cloud Contact Center

Digital Engagement

Administrator's Guide

January 2025

This content describes how to use the Digital Engagement Administrator's Console to offer digital engagement interactions to your customers.

About Five9

Five9 is the leading provider of cloud contact center software, bringing the power of the cloud to thousands of customers and facilitating more than three billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, delivering software to help organizations of every size transition from premise-based software to the cloud. With its extensive expertise, technology, and ecosystem of partners, Five9 delivers secure, reliable, scalable cloud contact center software to help businesses create exceptional customer experiences, increase agent productivity and deliver tangible results. For more information visit www.five9.com.

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Contents

What's New

This table lists the changes made in the last six releases of this document:

Release	Change	Topic
Jan 2025	Added new topic.	10DLC Vetting Tips and Guidelines
Dec 2024	Added new topics.	Custom CSS Support SMS Surcharges
Nov 2024	Added new topics.	Markdown Cards and Carousels
Sep 2024	Added Digital in Admin Console Content.	Digital in Admin Console
	Added Web Messenger Variables.	Configuring Language Options for Real Time Translation
	Keyword Management.	Keywords
Jul 2024	Removed support for Safari.	Managing Browser Notifications for Agents
	Added Email Signature and Park Email content.	Email Signature Park Email
Jun 2024	Added new topics.	SMS Dashboard
		SMS Failed Messages
		Alphanumeric & Shortcodes
May 2024	Added new topics.	Post Chat Survey
		After Hours Email
		Saving Original Inbound Messages
Apr 2024	Added a new script generator for Canada.	Using the Script Generator

Release	Change	Topic
Mar 2024	Added SMS Opted Numbers.	SMS Opted Numbers
	Updated email attachment size.	Inbound Email Requirements
	Updated chat attachment file types and sizes.	Supported Attachment File Types in Web Messenger
Feb 2024	Updated topic.	Defining Automated Messages for Chat Engagements
Dec 2023	Updated topics.	Creating a New SMS Broadcast Adding the Proactive Chat Components Enabling Global Settings Defining Agent Stickiness for Distributing Interactions Configuring Dispositions in SCC Configuring Dispositions in Admin Console

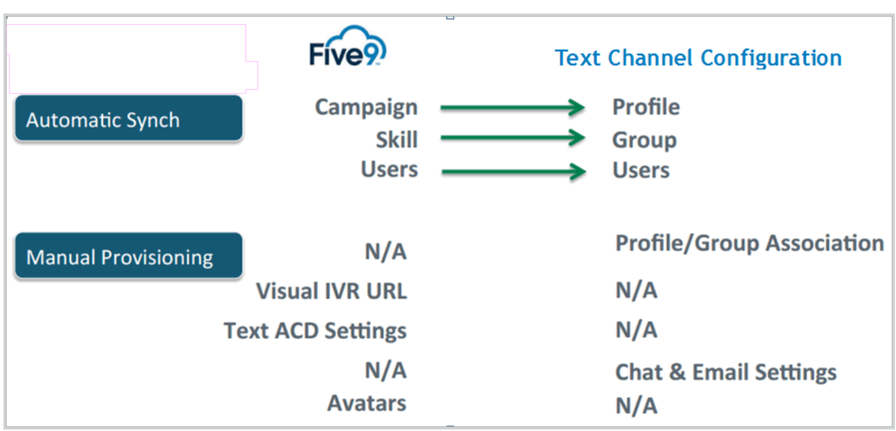
Understanding Digital Channels

Agents who are assigned digital channel skills can interact with customers through email, chat, and social media channels. To configure and enable digital channel features, you use the VCC Administrator application and the Digital Engagement Administrator's Console.

Before configuring digital channels, ensure that Five9 has enabled these features in your VCC domain.

Synchronization Between the VCC and the Digital Engagement Console

This figure shows how components of the VCC and Digital Engagement Console are synchronized.



Always modify campaigns, skill groups, and users only in the VCC Administrator's Application. Never do so in the Digital Engagement Console because changes in the console are overwritten when changes are made in the VCC.

In the Digital Engagement Administrator's Console, modify the components that are not synchronized from the VCC to the digital engagement channel server.

Character Limits for Domain Components

If you use digital engagement channels or plan to do so in the future, you must adhere to character limitations when assigning names to campaign components. Otherwise, the digital engagement server does not communicate with the VCC server.

Component	Characters
Digital Engagement Profile and VCC Campaign	255
Digital Engagement Group and VCC Skill	255
User (also email address)	50
Password	64
First Name	32
Last Name	32

Reference Files for the Consoles and Proactive Chat

The Five9-Consoles-and-Proactive-Chat-Examples.zip package that contains examples and URLs for the consoles and proactive chat. After you download the archive, follow the configuration instructions in the respective chapter.

Examples

This archive contains files, icons, and scripts that you can use as templates to implement the chat and email consoles, and Proactive Chat in your web site:

Root of the archive	Example JavaScript configuration file: `config.js`.
Chat	• CSS: Contains the default look and feel. You may customize as needed. • Fields: How to customize the chat console. • Frame: How to customize the console frame and embedded behavior in an `<iframe>` tag. • Logo: How to add a custom logo. • SimpleChat: How to add the chat console in a multi-page web site. • Theme: How to use a custom theme. • Usability: How to customize print, sound, and font options.
Email	Example email console in a multi-page web site.
Icons	Example icons that you can use to customize the consoles.
Proactive Chat	Example integration for triggered chat prompts, including a default CSS, a JavaScript configuration file, and options to customize print, sound, and font options.

Resources

This resource is used by the consoles:

Social Widget JavaScript	`https://app.five9.com/consoles/SocialWidget/five9-social-widget.min.js`

These resources are used by proactive chat:

Chat Console	`https://app.five9.com/consoles/ChatConsole/index.html`
Proactive Chat JavaScript	`https://app.five9.com/consoles/ProactiveChat/javascripts/five9proactivechat.min.js`

Chat and Email Console URLs

These demo URLs are available for Plus applications and Java-based clients:

Plus Applications	
Chat URL	`https://app.five9.com/consoles/ChatConsole/ChatDemo.html?tenant= <tenantname>&profiles=<profileName>`
Email URL	`https://app.five9.com/consoles/EmailConsole/EmailDemo.html?tenant= <tenantname>&profiles=<profileName>`

Java-Based Clients	
Chat URL	`https://sococare.five9.com/SoCoCare/ChatConsole/ChatDemo.html?tenant= <tenantname>&profiles=<profileName>`
Email URL	`https://sococare.five9.com/SoCoCare/EmailConsole/EmailDemo.html?tenant= <tenantname>&profiles=<profileName>`

Priority of Text Interactions

The Automatic Interaction Distributor (AID) routes incoming text interactions to available agents based on the priority assigned to each interaction. Priorities of HIGH, MEDIUM, or LOW are determined by business rules, language used in the text of the interaction, and waiting time in the media queue.

> **Note**
> Voice interactions are always prioritized and distributed before chat interactions. When multiple voice and chat interactions are in queue, the chats will not be distributed to ready agents for voice and text until all voice interactions in that queue are engaged.

Agent skill priority can only be set for calls and doesn't affect how chats will be distributed. Even though the initial priority for calls and chat can be set, this doesn't overrule that we always prioritize calls

You can influence the priority of text interactions by setting waiting times, or *starvation* periods: after a number of seconds, the priority of a text interaction is changed from 3 or 2 to 1 so that the AID routes it first.

This feature is located under **Profiles > Information > Increase email priority after (seconds)**. Configure each profile separately. To give priority to a profile, set the starvation periods to a low number.

Aligning VCC and SCC Priorities. Digital Engagement priorities range from 1-100, with 100 being the highest priority. These values are set in the Priority tab of the IVR Skill Transfer module and align with SCC priorities of one through three, with one being the highest priority. These priorities align as follows:

- VCC priority 61-100 = SCC priority 1
- VCC priority 31-60 = SCC priority 2
- VCC priority 0-30 = SCC priority 3

To avoid starvation, set priorities to VCC 100/SCC 1, VCC 99/SCC 2, VCC 98/SCC 3 for existing items in queue.

Profiles with varying priority:

Profile	Default	High Priority	Medium Priority	Low Priority
Email	300 seconds	5 seconds	200 seconds	400 seconds
Chat	30 seconds	1 second	15 seconds	40 seconds
Social	300 seconds	5 seconds	200 seconds	400 seconds

To test routing priority, follow these steps:

1. Ensure that agents are set to AID mode for the text items.
2. Send email, chat, and social interactions with low priority first, followed by medium priority, and finally high priority.

   The high priority interactions are routed before the medium priority interactions, which are routed before the low priority interactions.

Business Rules and Interaction Processing

By default, Agent Desktop Plus assigns incoming interactions the MEDIUM priority and routes items to agents on a first-in-first-out (FIFO) basis. Any business rules that you define to override the default FIFO round-robin routing algorithm take precedence over the system defaults. For example, you might define business rules that a HIGH priority to items coming into the queue from a certain Facebook fan page; those interactions will be processed first, and might even be sent to agents belonging to a specific skill group.

In addition to business rules, you set *starvation* periods to prevent items of MEDIUM and LOW priorities don’t wait endlessly in the media queue. A starvation period is the period of time an item waits for some action such as, assignment to an agent or transfer of an item to a different agent or returning the item to the media queue.

As the NLP engine learns to recognize terms used in text interactions for a certain profile, it might also assign priorities to incoming items as they enter the queue.

Priority Updates for Items in the Media Queue

After an item enters the media queue, the priority can be based on activity, rules, and waiting times. These events can increase the priority:

- An item reaches the maximum waiting time for a specified starvation period.
- An item is transferred to another agent.
- An item is returned to the media queue because it was not accepted by an agent before the time-out.

When an item is returned to the media queue, the priority is automatically raised to the next priority level. Starvation settings apply.

Digital in Admin Console

This content guides you through the process of migrating from SCC Admin to Admin Console. The migration introduces several key features designed to enhance administrative capabilities and streamline management processes.

Features:

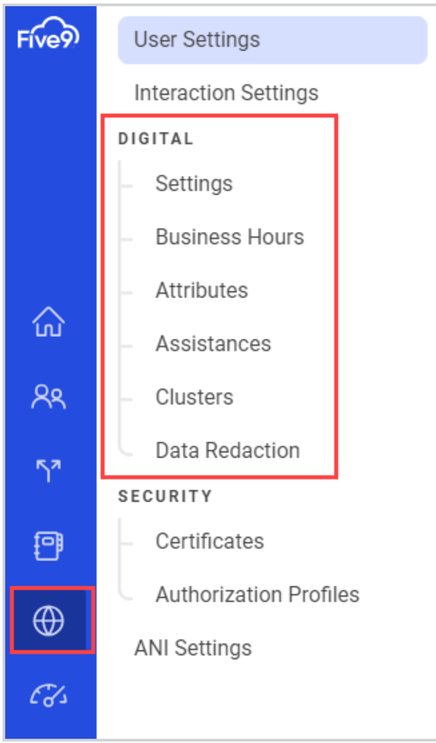
- Migrate Existing SCC Admin Data: Seamlessly transfer all existing SCC admin data to the new Admin Console, ensuring a smooth transition with minimal disruption.
- Configure Digital Entities: Admin Console now allows you to configure various digital entities including email, chat, and global digital settings, providing a centralized platform for digital management.
- New Email Authentication Method: Introduce an additional user authentication method for email, enhancing security and flexibility for user access.

Benefits:

- Unified Administrator Experience: Admin Console offers a unified experience where administrators can configure and manage both Digital and Voice settings in one place, simplifying the administrative workflow.
- Intuitive User Interface: Enjoy a new, intuitive user experience in the Admin Console that makes navigation and configuration easier and more efficient.

To initiate the migration, select any Digital tab under Manage Environment. During the migration, Chat and Email operations will not be affected. All SCC Admin data will be accessible in the Admin Console under the corresponding pages.

> **Note**
> After enabling the domain for Admin Console in Digital, SCC Admin will switch to read-only mode for Email, Chat, and Global Digital Settings. Admin can access the Reports tab in SCC Admin.



Before you Begin

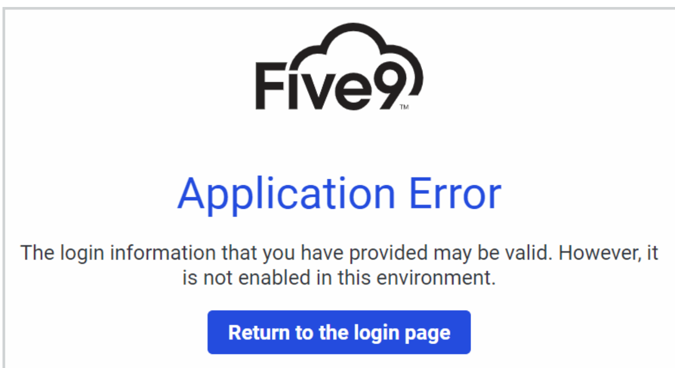
- Log into Admin Console.
- Assign Digital Permissions and Permission Sets.

Log into Admin Console

You use the Five9 Administrator Console to log into your Five9 account and access Admin Console.

1 Enter the URL that applies to your location.
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/
2 Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



Digital Permissions and Permission Sets

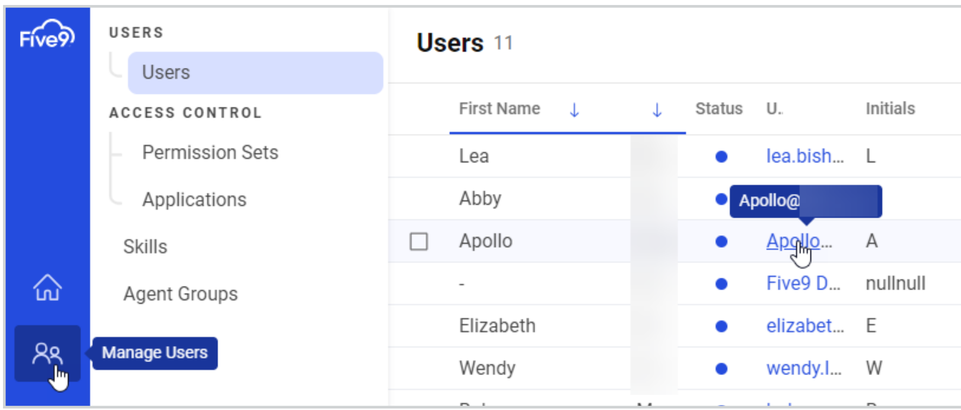
Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required for Digital.

> **Note:** Only admins with permission to create and edit users can assign permissions on the **Manage Users** page. Contact your administrator to obtain these permissions.

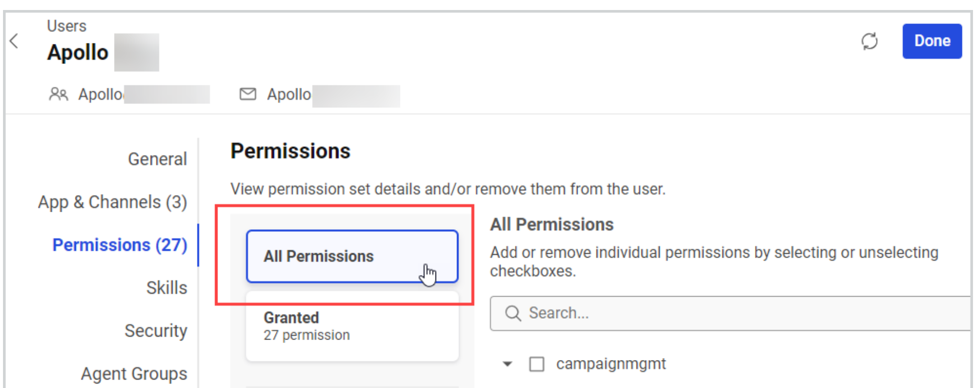
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Administrator Console documentation).

Assigning Permission Sets

1. Select **Users** on the Admin Console home page.
2. Select the user hyperlink on the Users page.



3. Select the Permissions tab and select **All Permissions**.

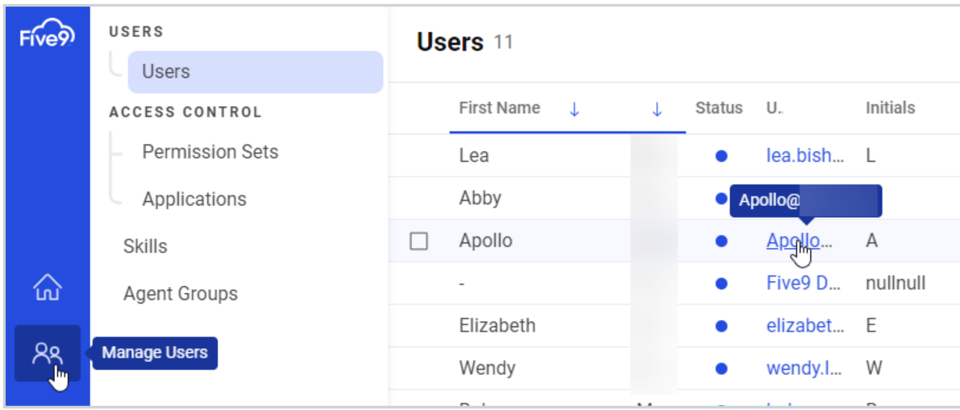


4. Type the permission group name from the table in **Digital Permissions and Permission Sets** into the search field or scroll the list to the permission group, and select the desired permissions or group.
5. Select **Done**.

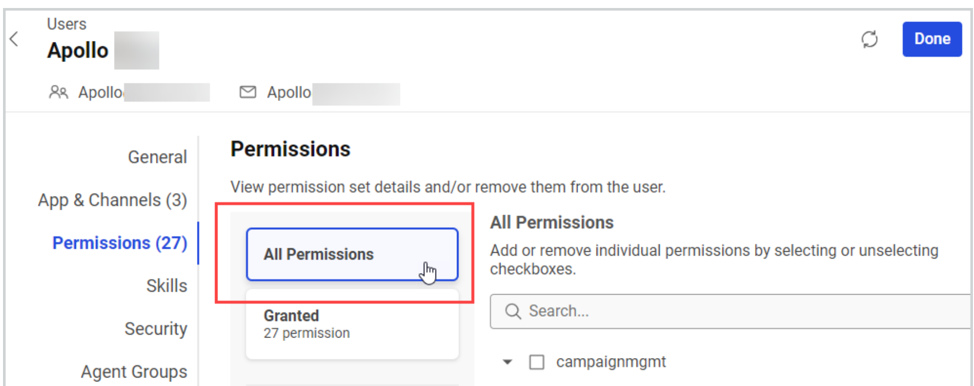
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

1 Select the user hyperlink on the Users page.



2 Select the Permissions tab and select **All Permissions**.



3 Type the permission group name from the table in **Digital Permissions and Permission Sets** into the search field or scroll the list to the permission group, and select the desired permissions or group.

4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

Digital Permissions

This section presents the user permissions required to view all the Digital cards on the Admin Console home page and access the described features. The permissions are:

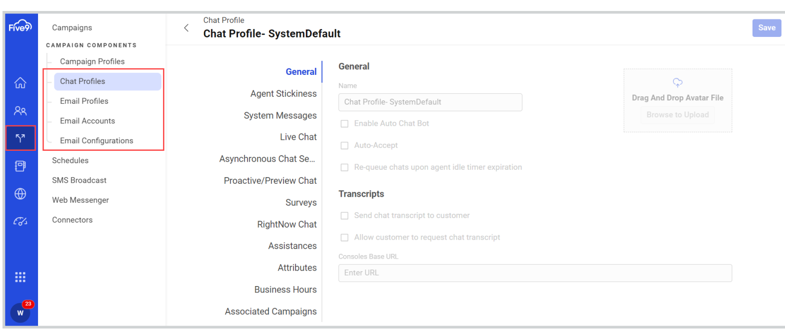
Group	Subset	Permission	Description
messaging	**business-hour**	**Create business hour** **View business hour** **Delete business hour** **Edit business hour**	Create, view, delete, and edit business hours.
	cluster	**Delete Cluster** **Create Cluster** **View Cluster** **Edit Cluster**	Delete, create, view, and edit clusters.
	digital-profile	**Create Digital Profile** **Delete Digital Profile** **Edit Digital Profile** **View Digital Profile**	Create, delete, edit, and view profiles.
	web-messenger	**Configure web messenger**	Configure web messenger.
	service-account	**Edit Service Account** **Create Service Account** **Delete Service Account** **View Service Account**	Edit, create, delete, and view accounts.
	email	**Create Email Configuration** **Edit Digital Configuration** **View Digital Configuration** **Delete Email Configuration**	Create, edit, view, and delete configurations.
	settings	**View Digital Settings** **Edit Digital Settings**	View and edit settings.
	data-redaction	**Delete data redaction rule** **Edit data redaction rule**	Delete, edit, create, and view data redaction rules.

Group	Subset	Permission	Description
		Create data redaction rule **View data redaction rule**	
	attribute	**Create Attribute** **Delete Attribute** **Edit Attribute** **View Attribute**	Create, delete, edit, and view attributes.
	chatprofiles	**View chat profile**	View chat profile.

SCC Admin to Digital Admin Console Mapping

The mapping table ensures a smooth transition from SCC Admin to the Digital Admin Console. It outlines how each feature, function, or data element in SCC Admin corresponds to its counterpart in the Digital Admin Console.

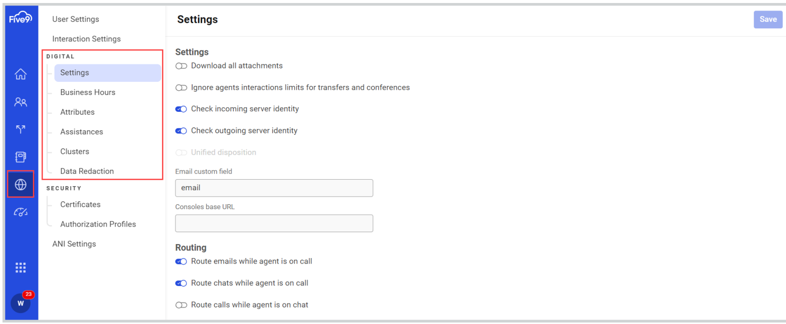
Digital Components



SCC Admin	Digital Entity in Admin Console
Profiles > Information	• Chat related information has moved to **Manage Campaigns > Chat Profile > General** • Email related information has moved to **Manage Campaigns > Email Profile > General**

SCC Admin	Digital Entity in Admin Console
Profiles > Assistances	• **Manage Campaigns > Chat Profile > Assistances** • **Manage Campaigns > Email Profile > Assistances**
Profiles > Dispositions	**Manage Campaigns > Campaigns > Dispositions**
Profiles > Chat	**Manage Campaigns > Chat Profile**: • System Messages • Live Chat • Asynchronous Chat Settings • Proactive/Preview Chat
Profiles > Email	**Manage Campaigns > Email Configuration**
Profiles > Survey	**Manage Campaigns > Chat Profile > Survey**
Profiles > Rules & NLP	**Manage Campaigns > Campaign > Digital** > Rules file can be uploaded
Profiles > Attributes	• **Manage Campaigns > Chat Profile > Attributes** • **Manage Campaigns > Email Profile > Attributes**
Profiles > Data Redaction	• **Manage Campaigns > Chat Profile > Data Redaction** • **Manage Campaigns > Email Profile > Data Redaction**
Profiles > Agent Stickiness	• **Manage Campaigns > Chat Profile > Agent Stickiness** • **Manage Campaigns > Email Profile > Agent Stickiness**
Profiles > EW	**Manage Campaigns > Campaign > Interaction Flow > EW options for Email, Chat, Case**
Profiles > Business Hours	**Manage Campaigns > Chat Profile > Business Hours**
Profiles > RightNow Chat	**Manage Campaigns > Chat Profile > RightNow**

Digital Settings



SCC Admin	Digital Entity in Admin Console
Users	Exists as Manage Users in Admin Console
Groups	**Manage Campaigns > Campaigns > Skills > Digital Skill**
Clusters	**Manage Environment > Digital - Clusters**
Disposition	**Manage Environment > Campaigns > Dispositions**
Assistances	**Manage Environment > Digital - Assistances**
Attributes	**Manage Environment > Digital - Attributes**
Data Redaction	**Manage Environment > Digital - Data Redaction**
Global Settings > General	**Manage Environment > Digital - Settings**
Global Settings > Routing	**Manage Environment > Digital - Settings**
Global > Business Hours	**Manage Environment > Digital - Business Hours**
Global > Notifications	**Manage Environment > Digital - Settings**

Enabling Campaigns for Digital

To configure an existing campaign or create a new one, administrators must enable the following settings within Campaign Profiles for chat and/or email functionality.

> **Important**
> You cannot associate an OAuth2 token with more than one campaign. Tokens are campaign-specific and cannot be reused across multiple campaigns. Ensure each token is assigned to a single campaign to maintain proper functionality.

General Tab Configuration

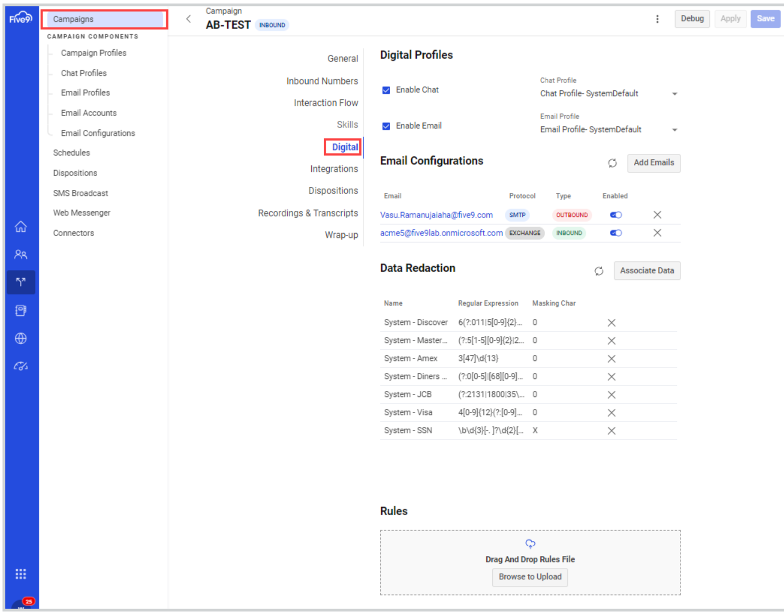
- Configure text interaction settings to meet business requirements.
- Set the default script or a specific engagement workflow for each channel (chat or email).

Skills Tab Configuration

- Assign the appropriate digital skill.

Digital Tab Configuration

- **Enable for Chat:** Configure a specific chat profile or select the system default chat profile if out-of-the-box (OOB) details suffice.
- **Enable for Email:** Configure a specific email profile or select the system default email profile if OOB details suffice.
- **Email Configurations:** Set inbound and outbound email configurations.
- **Data Redaction:** Select Associate Data from the list or upload a Rules file.



Note: To create Campaign Profiles, refer to Campaign Profiles in Admin Console for more information.

Digital Chat Profiles

A chat profile consists of chat-specific characteristics that allow customers to tailor chat interaction dynamics for a campaign. You can associate the same chat profile with one or more campaigns.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Chat Profiles and assign permissions and permission sets.

Important

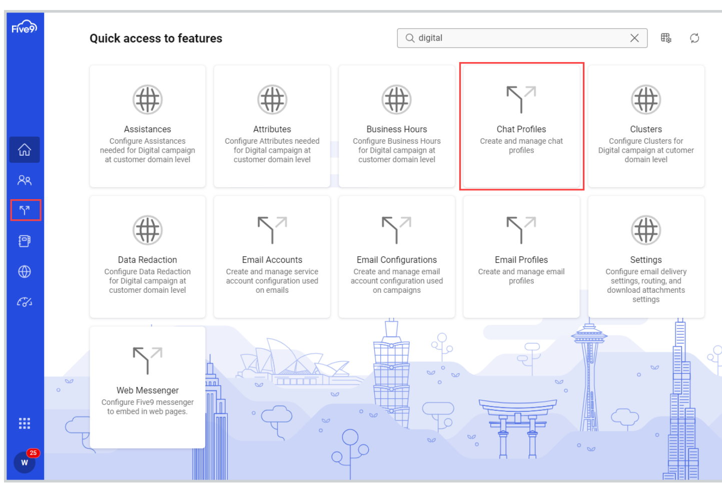
If you have not yet migrated to the Digital Admin Console, refer to Configuring Profiles to Support Proactive and Preview Chat in SCC Admin.

Use the following topics to create Chat Profiles in Admin Console.

Creating Digital Chat Profiles

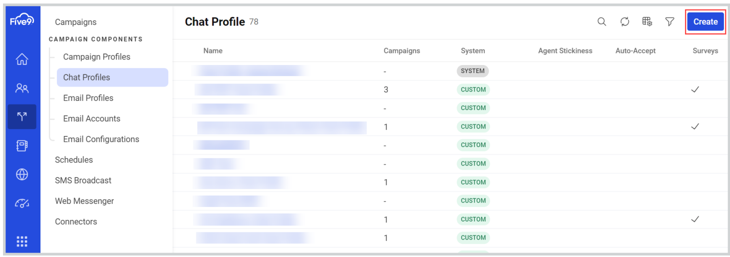
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Chat Profiles** card or the **Manage Campaign** icon in the sidebar navigation.



The **Chat Profile** page displays.

2 Select the **Create** button.



3 Enter a name for the chat profile and select **Save**.

The **General** page displays.

Digital Chat Profiles General Tab

In this tab, you can configure the chat presentation options, such as Enable Auto Chat Bot, Time to accept, Auto-Accept, queuing options, and also define your transcript options.

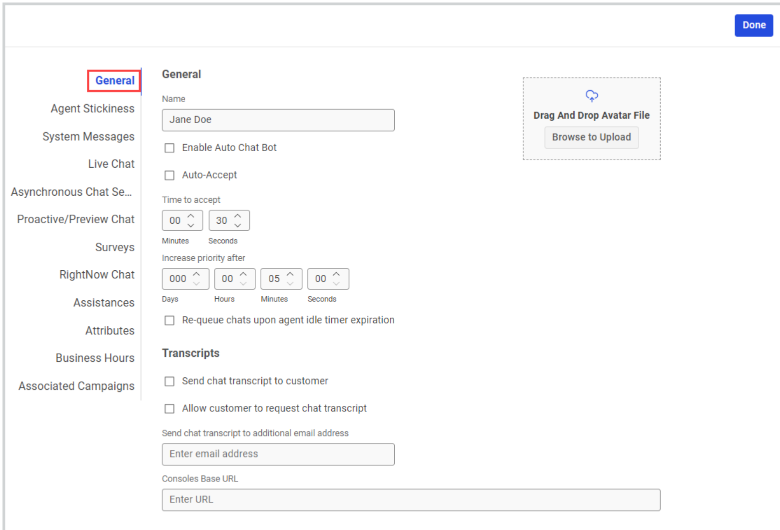
The Auto-Accept option automatically accepts interactions on behalf of agents. When enabled, the timer is disabled, and agents automatically receive interactions in their assigned queues without the ability to reject them.

If manual selection is enabled, interactions are added to the agents' list of assigned interactions. These interactions open in their application when agents click the browser notification of a new digital engagement interaction. To prevent agents from automatically accepting new interactions when they click browser notifications, you can:

- Disable browser notifications (see Managing Browser Notifications for Agents).
- Disable Auto-Accept for one or more channels.

Agents must accept interactions within a specified number of seconds. The Time to accept setting applies to the AID mode and can be set for each interaction type. The default setting is 30 seconds, but you can increase it up to 60 seconds.

When routing interactions by priority, the default value for email and social interactions is 5 minutes. For chat interactions, the recommended value is 5 minutes. New profiles are automatically set to 5 minutes.



Transcripts

Option	Definition
Send chat transcript to customer	• **Enabled**: Chat transcript is sent to customer using the email provided by the customer. • **Disabled**: Chat transcript option is not available to customer. **Important:** Outgoing email settings must be configured to send transcript.
Allow customer to request chat transcript	**Enabled**: Customer can request chat transcript within the chat interface. This is independent from the **send chat transcript to customer** option but will not send duplicate email transcripts. • **Disabled**: Chat transcript option is not available to customer within the chat interface. **Important:** Outgoing email settings must be configured to send transcript.
Send chat transcript to additional email addresses	Identify additional email addresses for chat transcript here. Multiple addresses must be separated by semicolons.

Digital Chat Profiles Agent Stickiness Tab

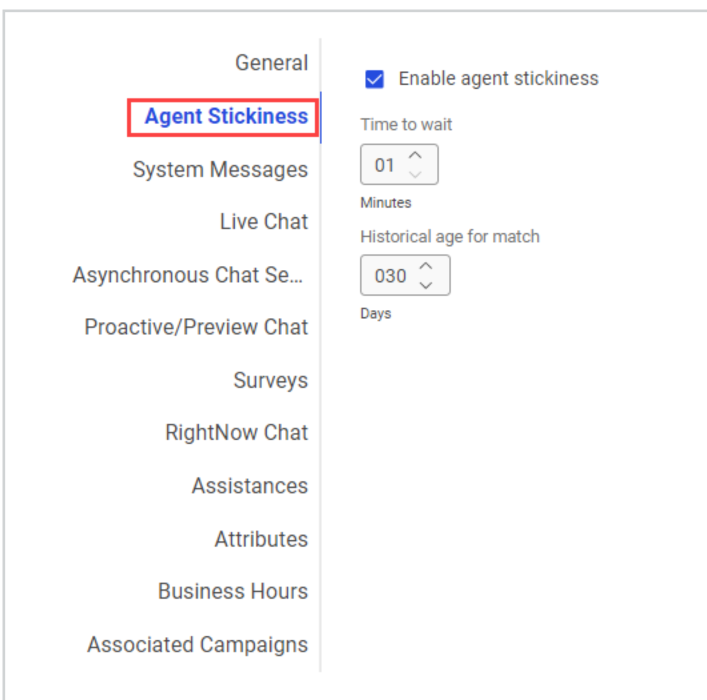
Agent Stickiness allows you to define how the system assigns digital engagement interactions for returning contacts. For new contacts, the system ignores these settings and routes the item to the next available agent.

This feature enables the system to manage the distribution of digital engagement interactions instead of the ACD. Before distributing an item, the system checks which agent previously handled the returning contact within the configured historical age for a match. If that agent becomes available within the configured minutes to wait, the system offers the interaction to that same agent.

If the timer expires, or if the assigned agent rejects or ignores the interaction, the system returns the interaction to the queue for distribution. If an agent logs out while there is an offered sticky interaction, the system will return the interaction to the queue after the timer expires.

Note

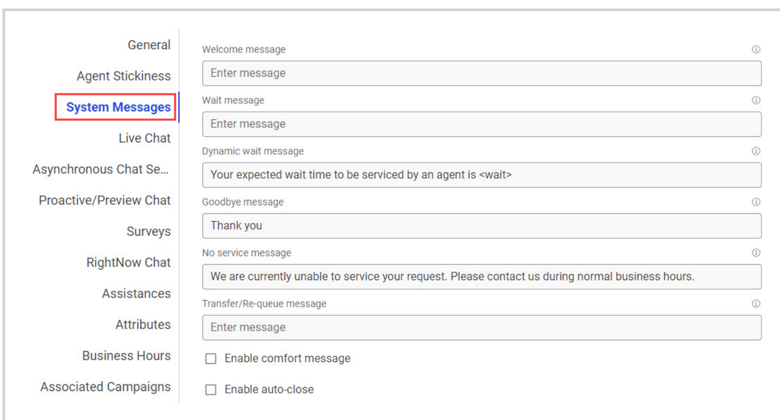
An agent logged in with cherry-pick mode can lock an interaction while it is being offered to another agent due to stickiness. Agent stickiness settings do not consider business hours.



Enable agent stickiness	Enables Agent Stickiness.
Time to wait	Maximum time to wait in minutes for the previous agent to become available and receive the chat interaction.
Historical age for match	Number of days to search the contact’s history to locate the last agent who handled the previous interaction with the contact. If the interaction is older than the setting, Agent Stickiness is not applied. This setting is a sliding 24-hour window and refers to calendar days. This setting does not consider business hours or holidays.

Digital Chat Profiles System Messages Tab

Define the automated messages customers see during chat sessions by entering the desired text for each message.



Welcome message	Displayed once the chat interaction is accepted by the agent.
Wait message	If configured, this message is displayed while the customer is waiting to be connected to an agent.
Dynamic wait message	In situations where the wait time surpasses one minute, this prompt takes precedence over the standard Wait Message. Otherwise, the system will revert to displaying the designated Wait Message. If the message contains the tag "<wait>" then the system replaces the tag in the message with the estimated wait time in minutes.

	The system calculates the waiting time every three minutes based on the past hour. This calculation includes only chats that are assigned to an agent. During the three-minute intervals, the same waiting time is displayed regardless of how many or how quickly chat interactions are delivered to agents. The wait time is rounded up to the next second, so the wait time is two minutes if the calculated time is 61 seconds.
Goodbye message	Displayed once the chat interaction has ended.
No service message	Displayed when no agents are logged into the profile.
Transfer/Re-queue message	Displayed when the assigned agent has become unavailable, the chat is being assigned to another agent.

Enable Comfort Message

Define the automated comfort messages displayed to a contact if the agent is taking too long to reply. The timer begins when the customer responds and restarts when the agent sends a message. Similarly, inactivity by the contact can start an option to automatically close the chat window.

Note

The customer-idle time restarts when a chat interaction is transferred to another agent.

Important

If you use the agent-idle timer and the automatic close option you can potentially send confusing messages to your customers. You must carefully plan the timing of your agent-idle timer messages and the close inactive interaction timer to avoid these situations.

Example

In this scenario, the agent idle timer is configured for 30 seconds and an automatic close timer configured for 180 seconds. If agents are unresponsive, you can produce a confusing interaction for your customers, as outlined below:

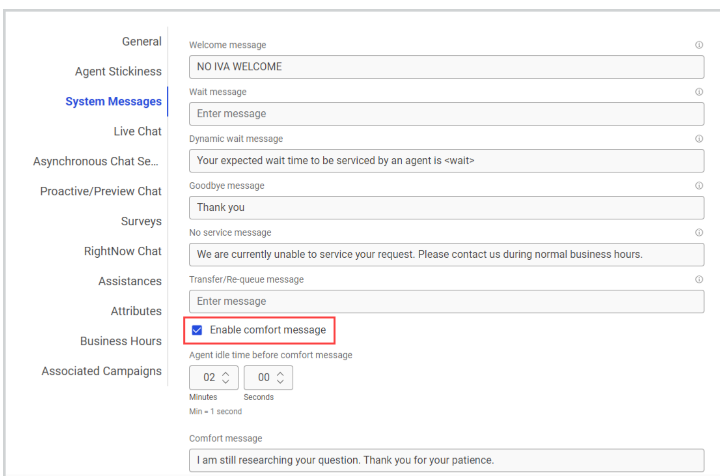
- The agent is busy. A comfort message is sent at 30th, 60th, and 90th second saying `I am still researching your ...`

- At the same time, at the 90th second, a warning is displayed to the customer: `I have not heard from you for a while...`
- Now the customer is confused. The customer has nothing to say because the agent is still researching. So the customer waits.
- At 120th and 150th second intervals, additional comfort messages are displayed to the customer: `I am still researching your…` because the agent is still busy or unresponsive.
- At the 180th second the chat is automatically closed due to inactivity.

No timer setting is generic for all because every contact center is different. You must carefully balance the timing of your messages with the responsiveness and task load of your agents. If your agents typically respond to chat interactions within 30 seconds, the scenario described above presents no problem or confusion to your customers. They would never receive the agent-idle comfort messages. Once an agent initially responds to the chat, the agent-idle timer is turned off and the customer no longer receives agent-idle comfort messages.

The reminder message is disabled by default. To configure the reminder message:

1 Select the **Enable Comfort Message** option.



2 Configure the agent-idle time interval.

You can configure a time interval from 30 to 600 seconds (default is 120 seconds). Any text entry in the chat by the agent resets this timer. With no agent activity this message is sent at the defined interval.

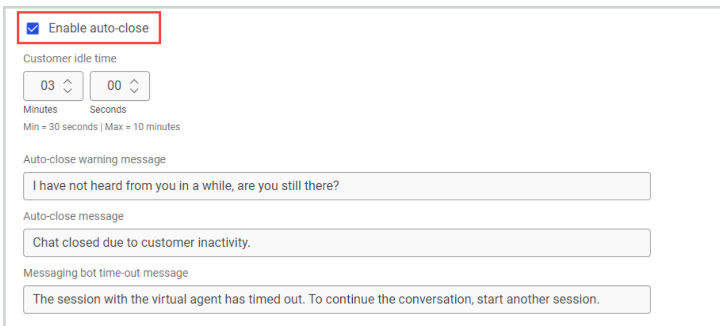
3 Define a Comfort message containing up to 2,000 characters.

The default Comfort message is `I am still researching your question. Thanks for the patience`. If you enable this option, you must define a comfort message.

Enable Auto-Close

The chat automatic close feature is disabled by default. To configure automatic close for inactive chat sessions:

1 Select the **Enable auto-close** option.

2 

3 Set an inactivity time limit.

You can configure any time from 30 to 600 seconds. The default time to automatically close an inactive interaction is 180 seconds.

4 Define a Auto-close warning message containing up to 2,000 characters.

The default message is `I haven’t heard from you in a while, are you still there?`

The Auto-close warning message displays when one half of your customer idle timer has passed. The idle timer restarts with any new text entry from the customer.

5 Define a Auto-close message comtaining message up to 2,000 characters.

The default message is `Chat closed due to customer inactivity`. If you enable this option, you must define automatic close warning and timer settings.

No timer setting is generic for all because every contact center is different. You must carefully balance the timing of your messages with the responsiveness and task load of your agents. If your agents typically respond to chat interactions within 30 seconds, the scenario described above presents no problems or confusion to your customers, they would never receive the agent-idle comfort messages.

6 Define a Messaging bot time-out message up to 2,000 characters.

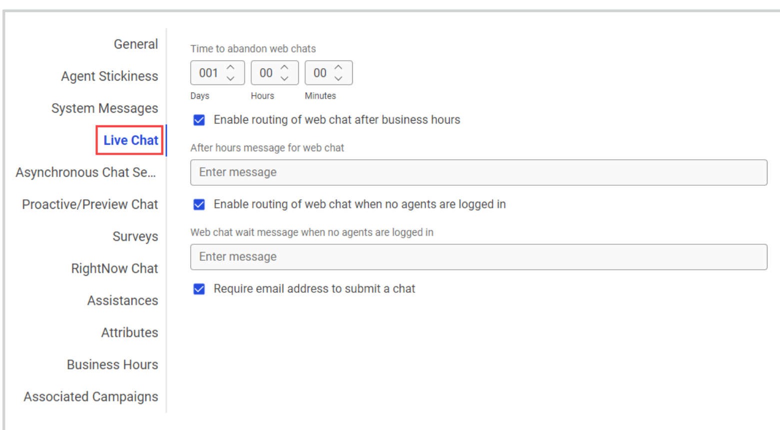
The default message is `The session with the virtual agent has timed out. To continue the conversation, start another session.` If you enable this option, you must define automatic close warning and timer settings.

Digital Chat Profiles Live Chat Tab

Define the behavior of web chat and asynchronous messages when they are received after business hours and when no agents are logged into the system. Enabling each routing setting below allows you to define the system message that is displayed to the corresponding setting.

Five9 also abandons native chats automatically if the end-user chat client disconnects and the end-user does not re-connect within approximately three minutes.

> **Note**
> If an inbound web chat or asynchronous message is transferred to another campaign, the time to abandon and business hour settings of the originating campaign persist.

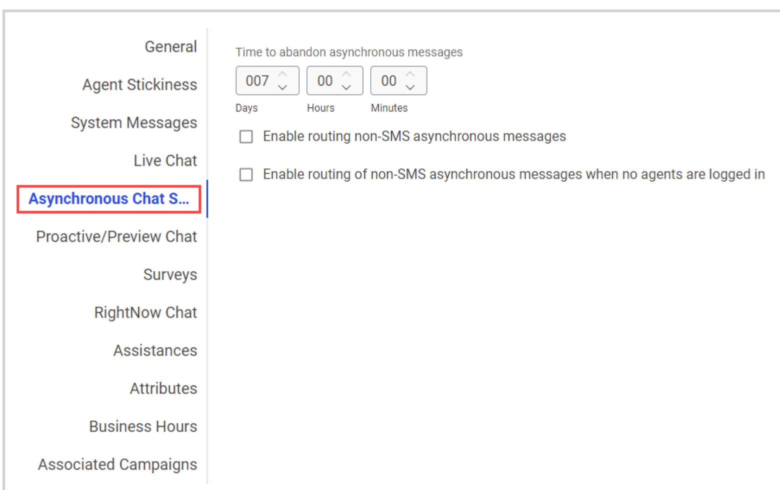


Time to abandon web chats	Set the time you want Five9 to abandon a still-open web chat that is unassigned. By default, web chats are abandoned after 1 day (24 hours), but you can keep them up to 7 days (168 hours). The system displays a warning message if you set a time less than 30 minutes or more than 7 days.

Enable routing of web chat after business hours	Web chats received outside of business hours are routed as usual. If you enable this setting, you may also define the **After hours message for web chat**.
Enable routing of web chat when no agents are logged in.	Web chats are routed as usual even if no agents are logged in and active. If you enable this setting, you may also define the **Web chat wait message when no agents are logged in**.
Require email address to submit a chat.	Requires an email to be added to submit a chat.

Digital Chat Profiles Asynchronous Chat Settings Tab

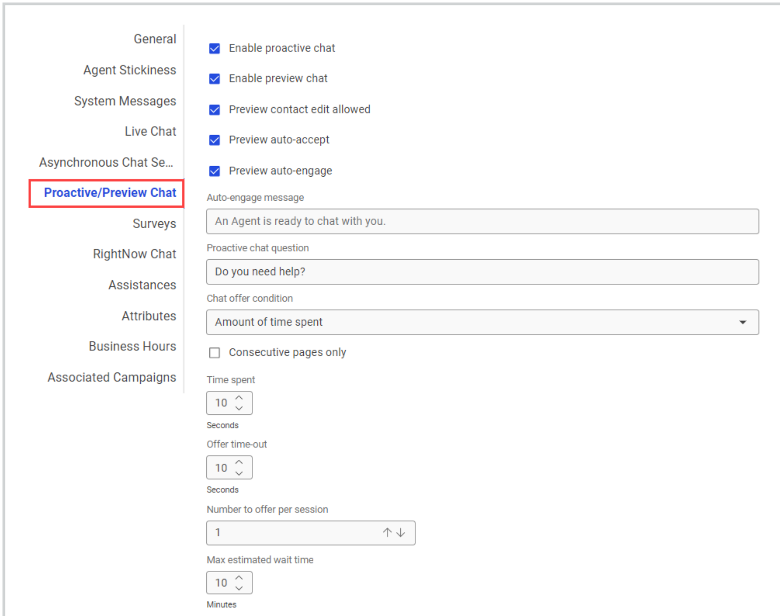
Asynchronous Chat Settings allow you to manage the behavior of web chat and asynchronous messages received after business hours or when no agents are logged in. By configuring the following settings, you can define the system messages displayed in each scenario.



Time to abandon asynchronous messages	You can specify the time for Five9 to abandon an unassigned, still-open chat. By default, non-SMS asynchronous messages are abandoned after 7 days, but you can set this period to less than 7 days. Note that the system displays a warning if you set a time less than 30 minutes or more than 7 days.
Enable routing of non-SMS asynchronous messages after business hours.	When enabled, this setting routes non-SMS asynchronous messages received outside of business hours as usual. You can also define the "After hours" message for these scenarios.
Enable routing of non-SMS asynchronous messages when no agents are logged in.	If routing after business hours is not enabled, this setting routes non-SMS asynchronous messages even if no agents are logged in. You can also define the "Non-SMS asynchronous wait" message for these scenarios.

Digital Chat Profiles Proactive/Preview Chat Tab

Select a combination of preview and proactive chat for your agents if the chats are added to different profiles in the Digital Engagement Administrator application.

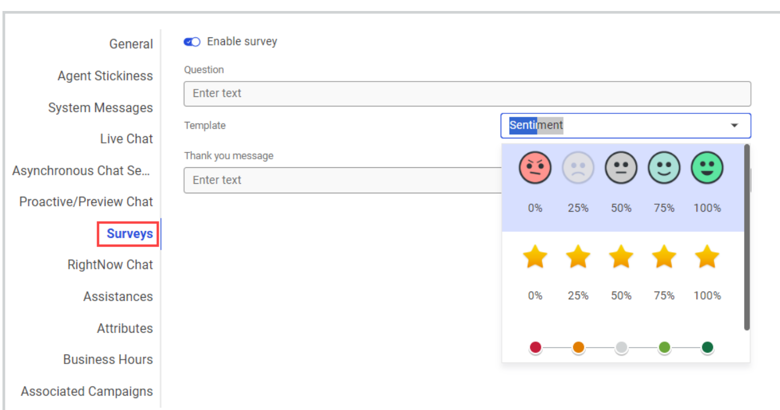


Enable proactive chat	Enables proactive chat at your web site.
Enable preview chat	Enables preview chat at your web site.
Preview contact edit allowed	Enables customers to enter or edit their contact information before they submit the chat request. Use cautiously because every additional step you ask a customer to take makes it less likely they ultimately engage with your agent.
Preview auto-accept	Enables preview chats to be automatically accepted by agents.
Preview auto-engage	Enables preview chats to be automatically engaged by agents. When agents are assigned preview chats, either by locking or by accepting automatically, a connection to the agent waiting to chat is displayed to the customer. The default message displayed to the customer is the message configured for proactive chat.
Auto-engage message	Displayed once the chat is accepted by the agent.

Proactive chat question	Question that your visitor sees in the proactive chat prompt.
Chat offer condition	Condition that prompts the chat offer.
Consecutive pages only	Whether the chat is offered only after the customer looks at consecutive web pages.
Time spent	Number of seconds (mouse hover time) before extending a proactive chat offer.
Offer timeout	Number of seconds before the chat offer expires.
Number to offer per session	Number of offers a visitor can receive during a single session at your web site.
Max estimated wait time	Maximum number of minutes for the chat customer to wait for an agent.

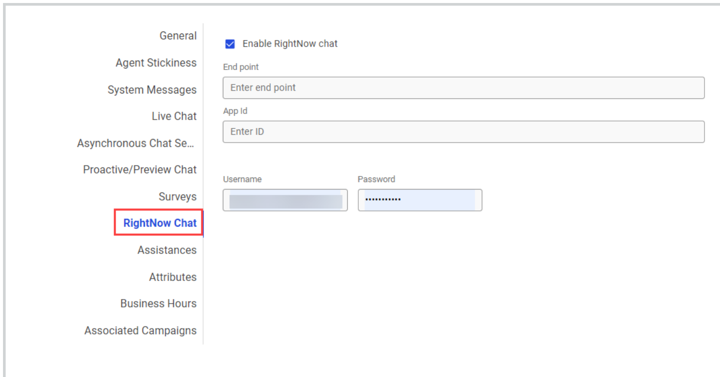
Digital Chat Profiles Surveys Tab

Customize the survey question for each profile and select a template for the rating scale. View the survey results in the Social Reports section of the Dashboards and Reports application.



Digital Chat Profiles RightNow Tab

1 Select **Enable RightNow chat**.



2 Complete the fields:

- End point: Endpoint for the chat service in this format: `https:<Oracle_URL>/cgi-bin/<Oracle_interface_name>.cfg/services/chat_soap?wsdl`

  Example

  ```
  https://five9-2013.rightnowdemo.com/cgi-bin/five9-2013.cfg/services/chat_soap?wsdl
  ```

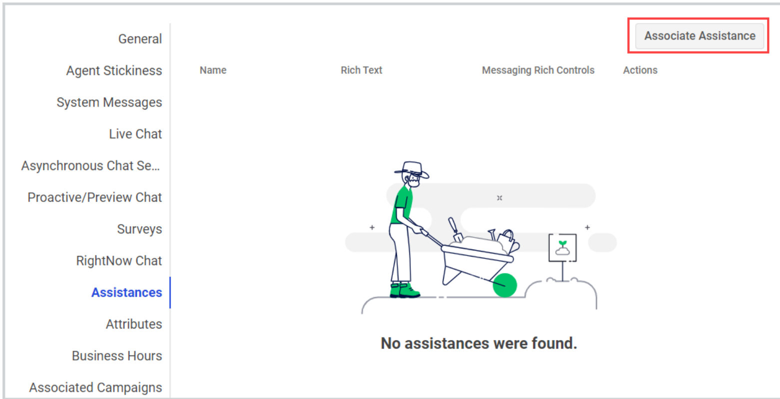
- App id: **Enter Five9_RN_CHAT**.
- Username: Oracle Service Cloud user name for the chat API.
- Password: Oracle Service Cloud password for the chat API.

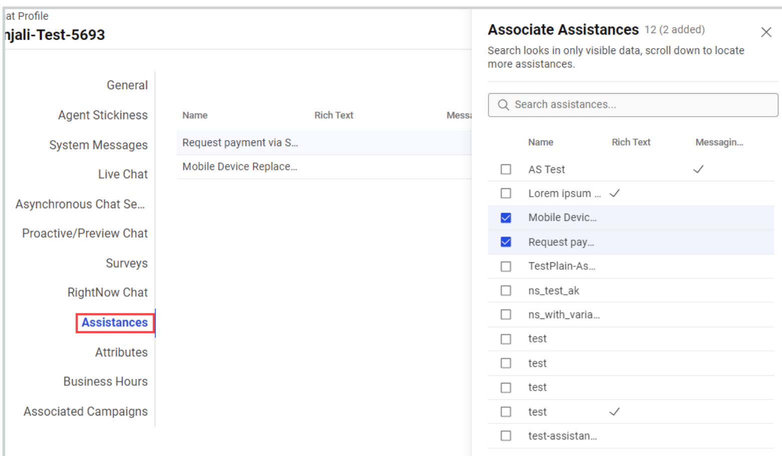
3 Select **Done**.

Digital Chat Profiles Assistances Tab

Assistances are predefined responses that agents can use during chat, email, or social posts to respond to the customer's question by sending a predefined answer. These predefined responses for assistance are designed to answer typical questions or to provide directions for a common situation.

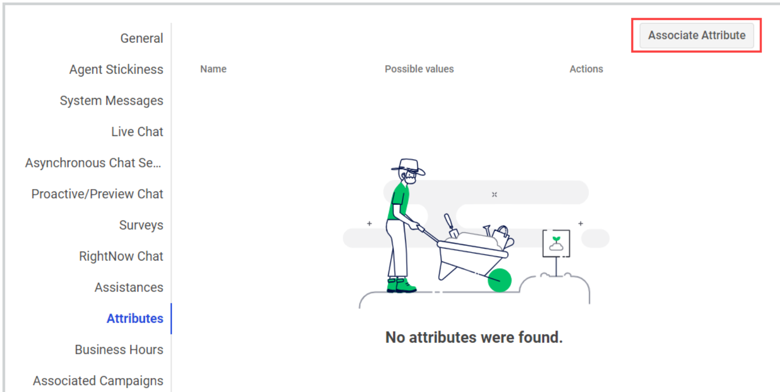
To associate an assistance with a profile, select the **Associate Assistance** button and select from the list.

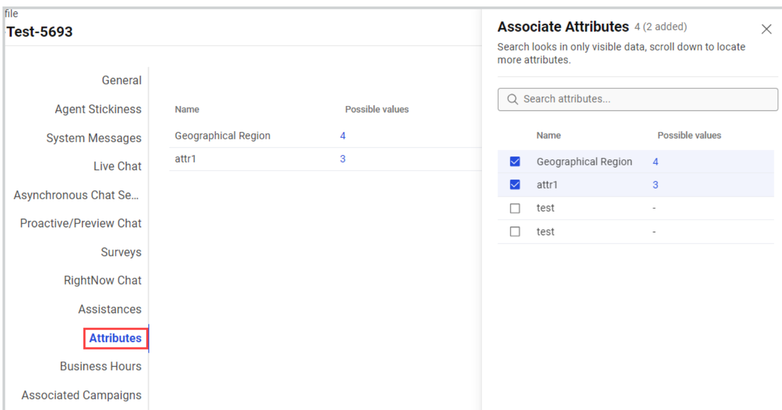




Digital Chat Profiles Attributes Tab

Assign predefined attributes to a profile to gather metrics about text post authors processed by agents assigned to the profile. Select the **Associate Attribute** button and select the attribute definitions you want to assign to the chosen profile.





Digital Chat Profiles Business Hours Tab

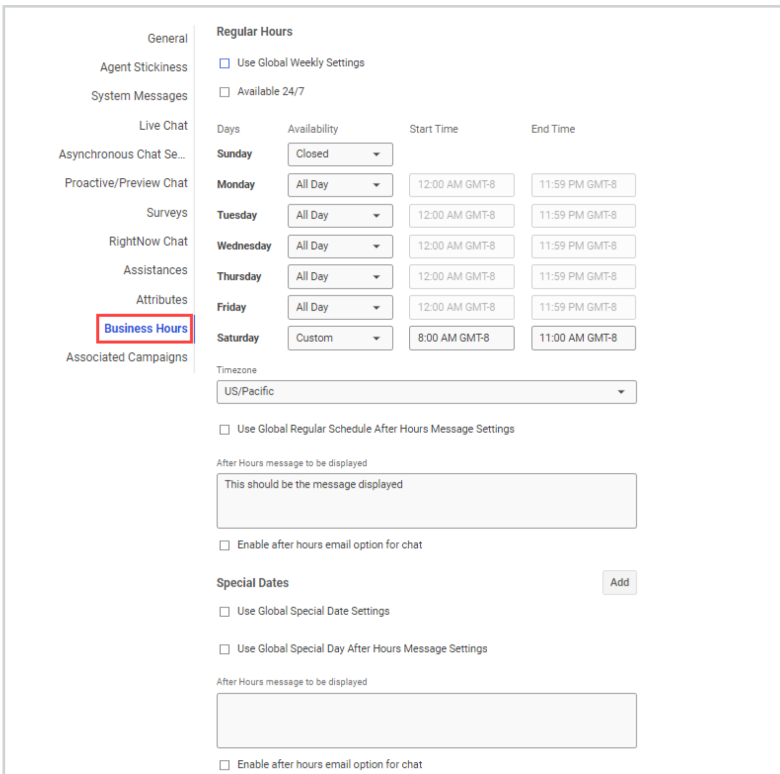
Customize chat hours of operation and include an after-hours message when agents are unavailable. Allow customers to submit emails outside business hours through the chat console.

To define special dates, such as holidays, select **Add** next to Special Dates. Add or delete multiple special date ranges individually. Special dates override weekday hours with the same schedule. Special messages override standard messages when defined for the same period.

Configure unique after-hours messages for weekdays, special dates, and global settings. To communicate that there is no service outside of your defined business hours, enter your message into the After Hours Message text box.

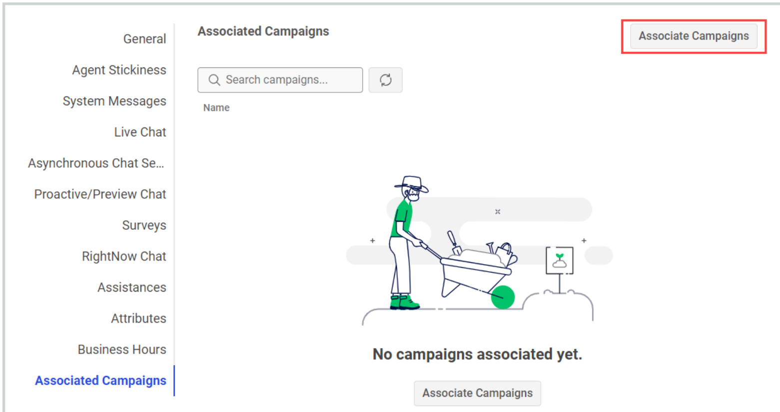
Create standard business hours in a single time zone, such as your domain time zone, for all seven days. Define special days, such as holidays, using a specific time zone for each special day.

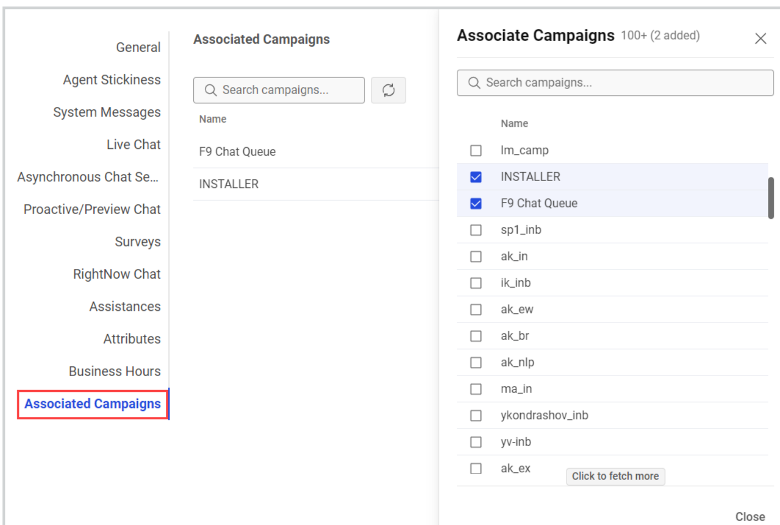
To use global settings for your domain, click **Use Global Weekly Settings**. By default, global settings are fully open, or all day every day. If no custom message is defined, the After Hours message in the Business Hours tab is shown.



Digital Chat Profiles Associated Campaigns Tab

To associate specific campaigns with a chat profile, select the **Associate Campaigns** button and select from the list.





Digital Email Profiles

An email profile consists of chat-specific characteristics that allow customers to tailor chat interaction dynamics for a campaign. You can associate the same email profile with one or more campaigns.

> **Note**
>
> This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Email Profiles and assign permissions and permission sets.

> **Important**
>
> If you have not yet migrated to the Digital Admin Console, refer to Email Profiles in SCC Admin.

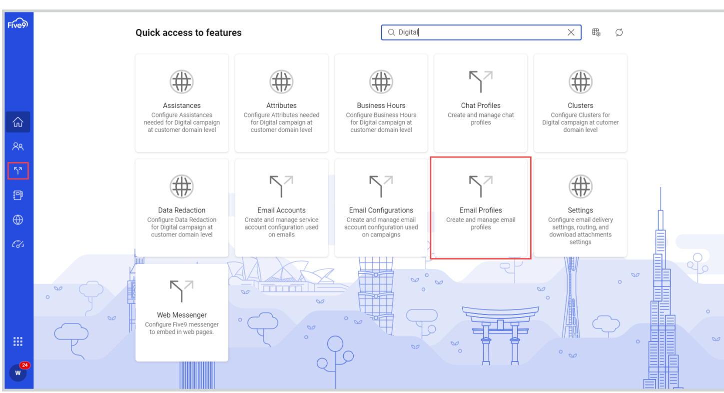
Use the following topics to create Email Profiles in Admin Console.

Creating Digital Email Profiles
Digital Email Profiles General Tab
Digital Email Profiles Agent Stickiness Tab
Digital Email Profiles Assistances Tab
Digital Email Profiles Attributes Tab
Digital Email Profiles Associated Campaigns Tab

Creating Digital Email Profiles

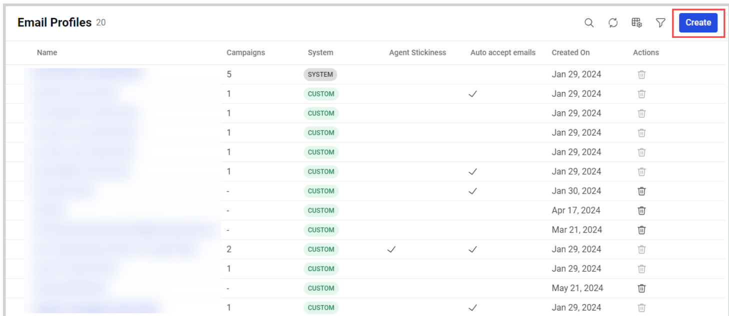
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Email Profiles** card or the Manage Campaign icon in the sidebar navigation.



The **Email Profile** page displays.

2 Select the **Create** button.



3 Enter a name for the email profile and select **Save**.

Digital Email Profiles General Tab

In this tab, you can configure basic features of an email profile such as Auto accept emails, Time to accept, and email priority.

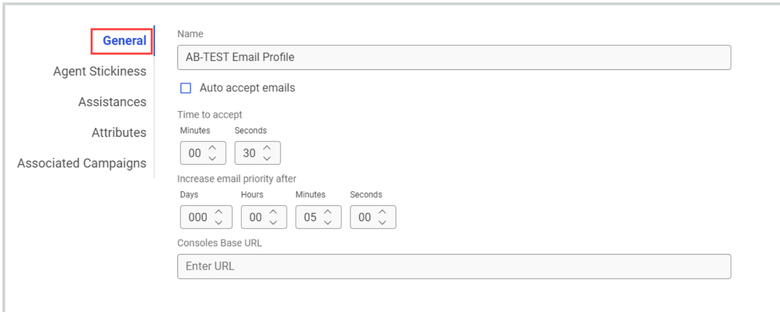
The **Auto accept emails** option automatically accepts interactions on behalf of agents. When enabled, the timer is disabled, and agents automatically receive interactions in their assigned queues without the ability to reject them.

If manual selection is enabled, interactions are added to the agents' list of assigned interactions. These interactions open in their application when agents click the browser notification of a new digital engagement interaction. To prevent agents from automatically accepting new interactions when they click browser notifications, you can:

- Disable browser notifications (see Managing Browser Notifications for Agents).
- Disable **Auto Accept** for one or more channels.

You must accept interactions within a specified number of seconds. The Time to accept setting applies to the AID mode and can be set for each interaction type. The default setting is 30 seconds, but you can increase it up to 60 seconds.

When routing interactions by priority, the default value for email and social interactions is 5 minutes. For chat interactions, the recommended value is 5 minutes. New profiles are automatically set to 5 minutes.



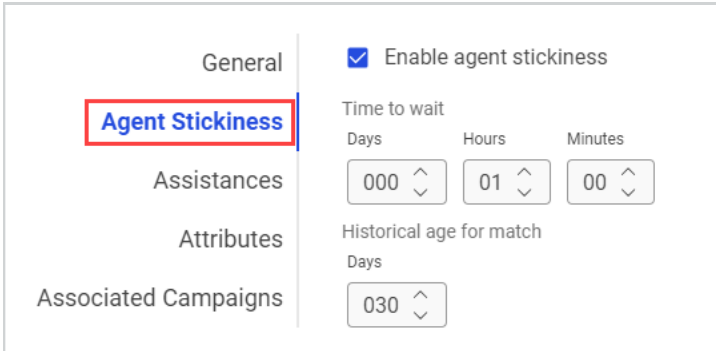
Digital Email Profiles Agent Stickiness Tab

Agent Stickiness allows you to define how the system assigns digital engagement interactions for returning contacts. For new contacts, the system ignores these settings and routes the item to the next available agent.

This feature enables the system to manage the distribution of digital engagement interactions instead of the ACD. Before distributing an item, the system checks which agent previously handled the returning contact within the configured historical age for a match. If that agent becomes available within the configured minutes to wait, the system offers the interaction to that same agent.

If the timer expires, or if the assigned agent rejects or ignores the interaction, the system returns the interaction to the queue for distribution. If an agent logs out while there is an offered sticky interaction, the system will return the interaction to the queue after the timer expires.

> **Note**
>
> An agent logged in with cherry-pick mode can lock an interaction while it is being offered to another agent due to stickiness. Agent stickiness settings do not consider business hours.

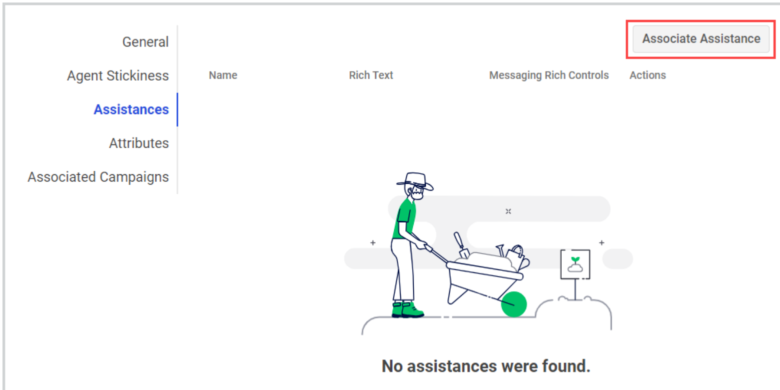


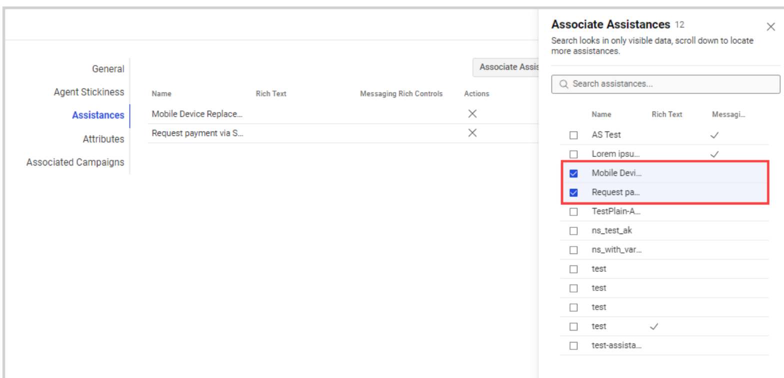
Field	Description
Enable agent stickiness	Enables Agent Stickiness.
Time to wait	Maximum time to wait in minutes for the previous agent to become available and receive the chat interaction.
Historical age for match	Number of days to search the contact's history to locate the last agent who handled the previous interaction with the contact. If the interaction is older than the setting, Agent Stickiness is not applied. This setting is a sliding 24-hour window and refers to calendar days. This setting does not consider business hours or holidays.

Digital Email Profiles Assistances Tab

Assistances are predefined responses that agents can use during chat, email, or social posts to respond to the customer's question by sending a predefined answer. These predefined responses for assistance are designed to answer typical questions or to provide directions for a common situation.

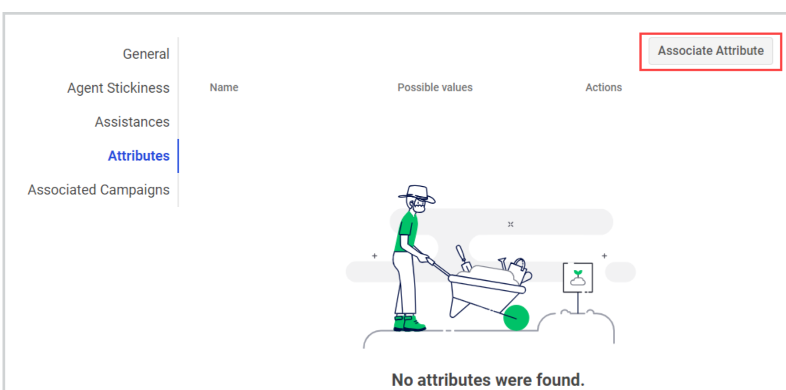
To associate an assistance with a profile, select the **Associate Assistance** button and select from the list.

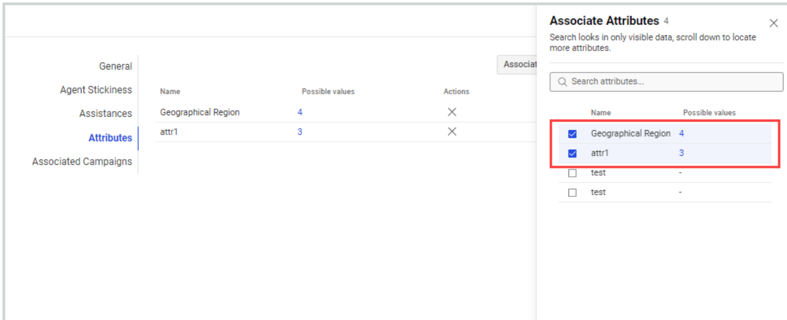




Digital Email Profiles Attributes Tab

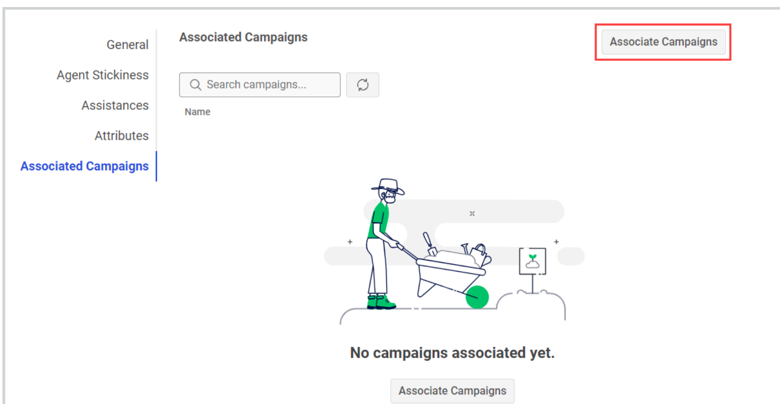
Assign predefined attributes to a profile to gather metrics about text post authors processed by agents assigned to the profile. Select the **Associate Attribute** button and select the attribute definitions you want to assign to the chosen profile.

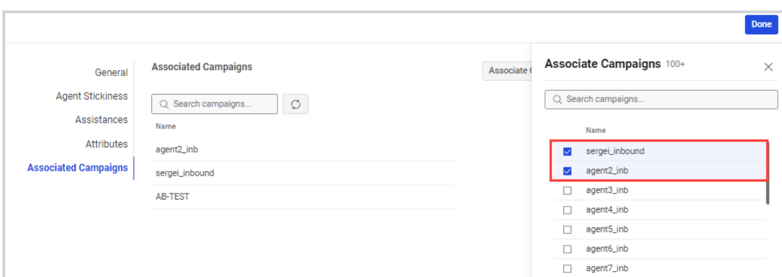




Digital Email Profiles Associated Campaigns Tab

To associate specific campaigns with an email profile, select the **Associate Campaigns** button and select from the list.





Digital Email Accounts

Create and manage service account configurations to enable secure email integration with Five9. Before proceeding, ensure that the service accounts are properly configured in Microsoft Azure. You must grant Five9 the necessary permissions to access designated inboxes, allowing seamless email communication between your organization's email system and the Five9 platform. For more information, see Get started with Office 365 Management APIs.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Email Accounts and assign permissions and permission sets.

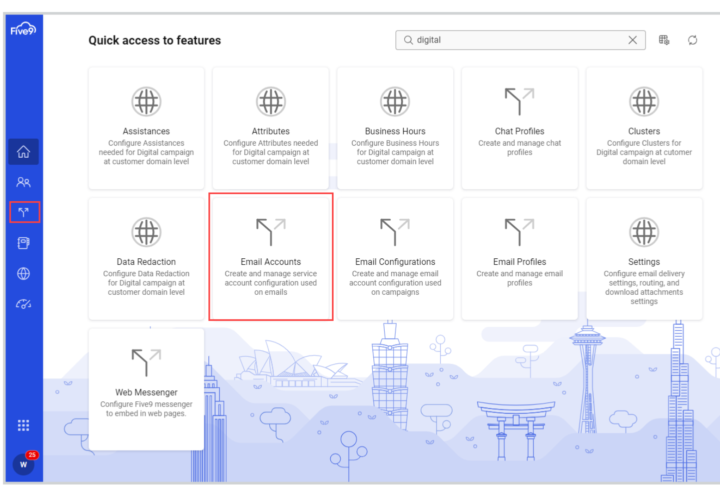
Important

If you have not yet migrated to the Digital Admin Console, refer to Creating Email Accounts in SCC Admin.

Creating Digital Email Accounts

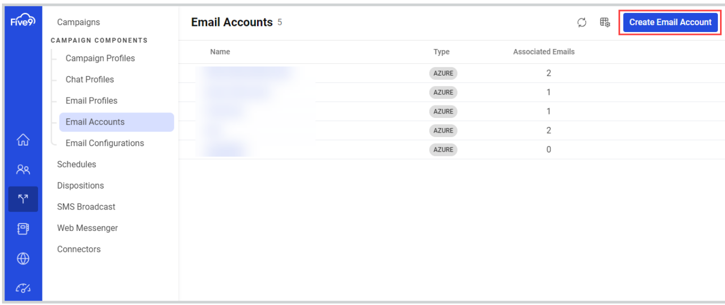
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Email Accounts** card or the **Manage Campaign** icon in the sidebar navigation.

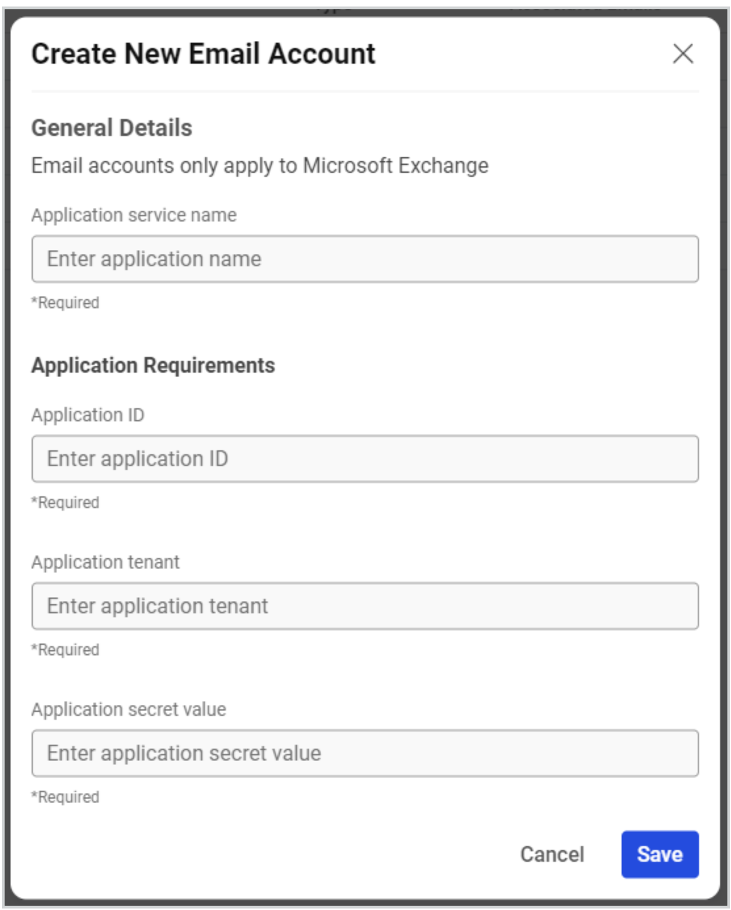


The **Email Accounts** page displays.

2 Select **Create Email Account**.



3 Fill in the required fields using the information available in your Microsoft Azure account.



Field	Description
Application ID	A unique identifier assigned to a registered application. It is used by Azure Active Directory (Azure AD) to identify and authenticate the application when it interacts with Azure services, APIs, or other resources
Application tenant	A dedicated instance of Azure AD that an organization or developer uses to manage identities and access for their applications.
Application secret value	A confidential string that an application uses to authenticate itself when interacting with Azure services or APIs. It acts as a password for the application and is used alongside the Application ID to obtain tokens from Azure Active Directory (Azure AD) during authentication.

4 Select **Save**.

Note

To edit an email account, select an account from the Email Accounts page.

Digital Email Configurations

Configure and manage email accounts to ensure secure and efficient communication for campaigns. Proper email configurations enable reliable interactions between your system and email services, ensuring smooth campaign operations.

This section provides instructions for creating and managing email account configurations in Admin Console. You will define email protocols, configure OAuth2 authentication, and manage client credentials to meet security and compliance standards.

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Email Configurations and assign permissions and permission sets.

Important

If you have not yet migrated to the Digital Admin Console, refer to Creating Email Accounts in SCC Admin.

Use the following topics to configure emails in Admin Console.

OAuth2 Client Credential Digital Email Configurations

Set up an email configuration to utilize a single main service account for Microsoft 365 (o365) while integrating additional sub-mail accounts. These sub-mail accounts, granted access to the main account, are processed through the Five9 Email Proxy. This approach enables authentication via the main service account, removing the need for individual authentication of each sub-mail account.

Before starting, ensure that you configure the service accounts in Microsoft Azure and grant Five9 the necessary permissions to access the designated inboxes. This setup guarantees smooth email communication between your organization’s email system and the Five9 platform.

When selecting this authentication type, the interface allows you to choose from existing service accounts or create a new one. The configured service account will manage both inbound and outbound email configurations.

Important

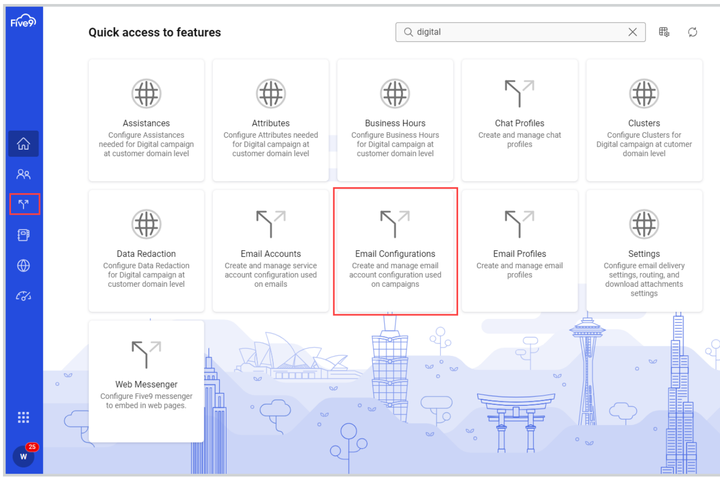
You cannot associate an OAuth2 token with more than one campaign. Tokens are campaign-specific and cannot be reused across multiple campaigns. Ensure each token is assigned to a single campaign to maintain proper functionality.

Note

This feature is available only for Microsoft 365 Online, not for Hosted Exchange Outlook 365.

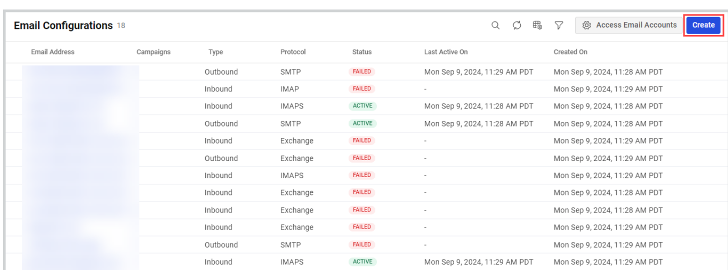
Creating OAuth2 Client Credential Digital Email Configurations

1 On the Admin Console home page, select the **Email Configurations** card or the **Manage Campaign** icon in the sidebar navigation.



The **Email Configurations** page displays.

1 Select **Create**.



2 Enter your email address.

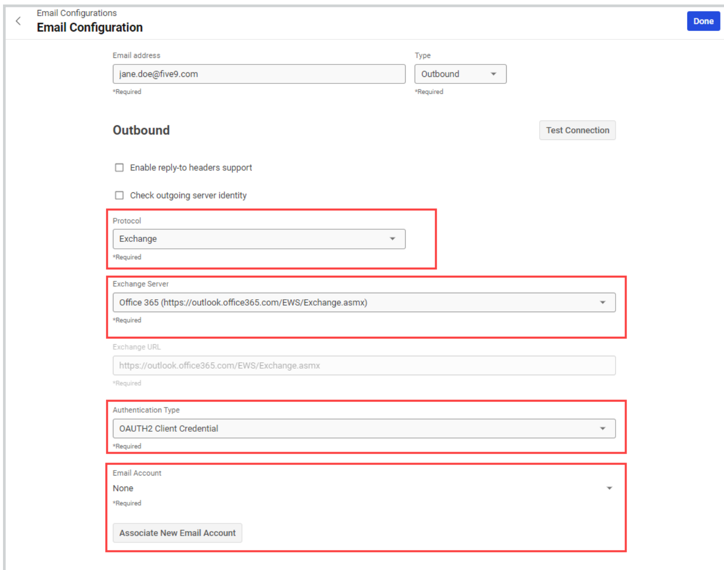
3 From the dropdown menu, select a **Type**. The configured service account will handle both inbound and outbound email configurations.

4 Select **Exchange**. Note that SMTP, IMAP, and POP3 are not supported.

5 Select **Office 365**.

6 Select **OAUTH2 Client Credential**.

7 If you have an existing email account, select it from the dropdown. If not, create a new one by selecting the **Associate New Email Account** button. For more information, refer to the section on Digital Email Accounts.



Note

To edit an email configuration, select an email address from the Email Configurations page.

OAuth2 for Office 365 Exchange Server Digital Email Configurations

Microsoft has announced the end of support for Basic authorization in Office 365 Exchange Server. Therefore, if your accounts still use Basic authorization, you must upgrade to OAuth2. When you select the POPS, IMAPS, or Exchange protocol with Office 365 Exchange Server, you can assign OAuth2 authentication for email interactions.

If the Azure AD tenant administrator has disabled the ability to consent to applications accessing company data, users will see a consent screen after authentication when adding a token.

In this scenario, your domain administrator must grant admin consent to the Five9 application before you can configure OAuth2. To grant corporate consent for OAuth2 configuration, you need administrative approval from a global administrator, application administrator, or cloud application administrator.

Important

You cannot associate an OAuth2 token with more than one campaign. Tokens are campaign-specific and cannot be reused across multiple campaigns. Ensure each token is assigned to a single campaign to maintain proper functionality.

Granting Administrator Consent

You have three options for consent.

Option 1: Sign in Using Administrator Credentials

To obtain admin consent using administrator credentials, follow these steps:

1. Select **Have an admin account? Sign in with that account**, and sign in using domain administrator credentials.
2. After authentication, select **Consent on behalf of your organization**.

Important

Ensure that you are signed in to the correct account for your business. When generating a token, Microsoft O365 will default to your currently logged-in account. Five9 will download emails from the current account. Five9 recommends using the same credentials for both the Campaign Email Address and OAuth2 configuration AD administrator.

Option 2: Authenticate Using Administrator Consent

To authenticate using administrator consent, follow these steps.

1. Share the appropriate admin consent screen link with the tenant administrator based on your location:

location	URL
US	https://login.microsoftonline.com/common/adminconsent?client_id=628fc081-b066-4302-9878-69974e6bb61e
CA	https://login.microsoftonline.com/common/adminconsent?client_

location	URL
	id=628fc081-b066-4302-9878-69974e6bb61e
EU	https://login.microsoftonline.com/common/adminconsent?client_id=f24962af-4f46-494f-a64d-344361177216
UK	https://login.microsoftonline.com/common/adminconsent?client_id=f24962af-4f46-494f-a64d-344361177216

2 Replace `<us_client_id>` and `<eu_client_id>` with the actual Five9 application IDs.

3 When prompted, authenticate and select **Accept**.

4 Once consent has been granted, you can begin adding tokens.

Option 3: Authenticate Using Powershell and Azure AD

To obtain admin consent using PowerShell and Azure AD, follow these steps:

1 Connect to Azure AD in PowerShell and create a new service principal using one of the following commands, based on your location:

- For Five9.com users:

```
New-AzureADServicePrincipal -AppId <us_client_id>
```

- For Five9.eu users:

```
New-AzureADServicePrincipal -AppId <eu_client_id>
```

2 Replace `<us_client_id>` and `<eu_client_id>` with the actual Five9 application IDs.

3 Open the Azure AD administration screen, go to Enterprise Applications, and search for Five9 applications.

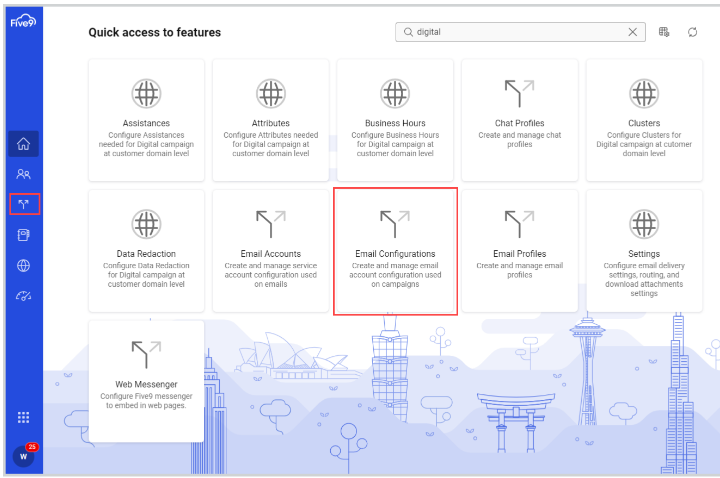
4 Select the application name, then go to **Permissions**.

5 Select **Grant consent for <application>**, then select **Accept**.

6 Once permissions are granted, you can begin adding tokens.

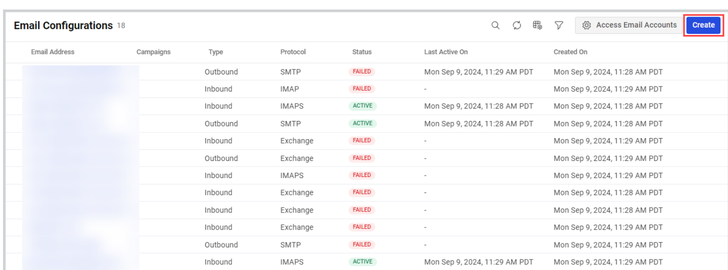
Creating OAuth2 for Office 365 Exchange Server Digital Email Configurations

1 On the Admin Console home page, select the **Email Configurations** card or the **Manage Campaign** icon in the sidebar navigation.

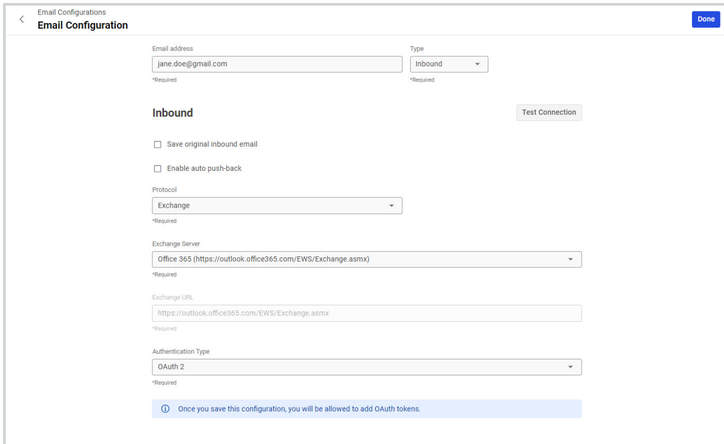


The **Email Configurations** page displays.

1 Select **Create**.



2 Enter your Email address.



3 Select a Type from the drop down list.

4 Select a protocol. OAuth2 is supported in POPS, IMAPS, and Exchange.

5 Confirm that **OAuth2** is selected as your Authorization type.

6 If you are not the account owner, proceed to step 9.

7 To add a token, click **Add token**.

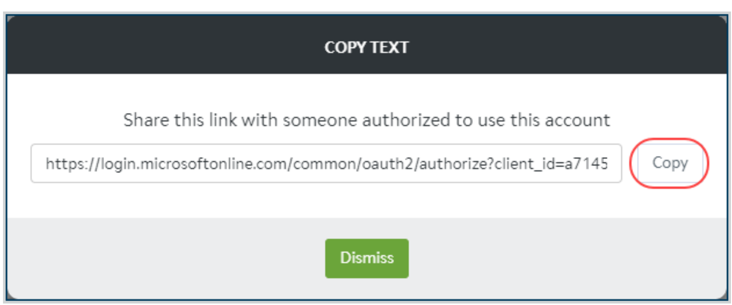
8 Follow the instructions to log into your Microsoft Exchange account.

This window closes once authentication is verified.

9 Proceed to step 11.

10 If you are not the account owner, click **Generate add token link**.

This button generates a link that you can send to the account owner to grant OAuth2 access to your Office 365 Exchange instance.



11 Send the generated link to the Office365 Exchange account owner to grant OAuth2 access to your Office 365 Exchange instance.

Once accepted, the OAuth2 token appears in your token list. You can refresh the list to see any updates.

12 Select the authenticated token from your token list.

If this is your first authorization token, it is selected automatically.

13 To verify that your OAuth2 setup is complete, click **Test**.

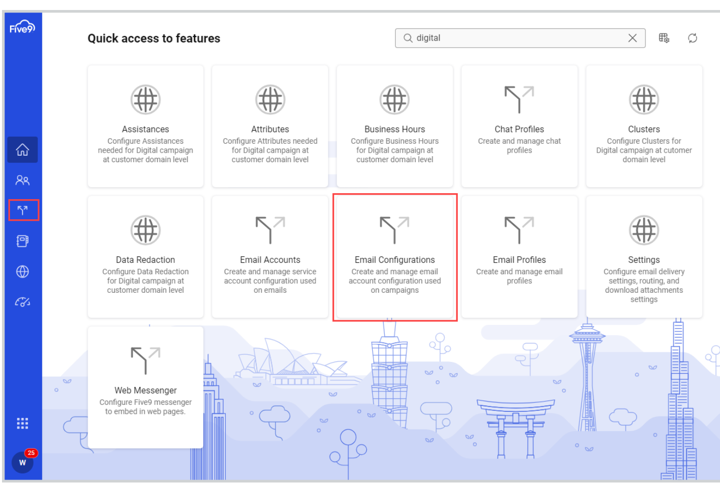
> **Note**
> Five9 recommends to connect Exchange Online with Exchange protocol, although it is possible to connect with IMAPS or POP3S protocols and Oauth2 authentication type.

Gmail Digital Email Configurations

New Gmail accounts use basic authentication and require additional configuration for Five9 to pull email interactions from your Gmail account. To complete your Gmail configuration, see sign in with app passwords.

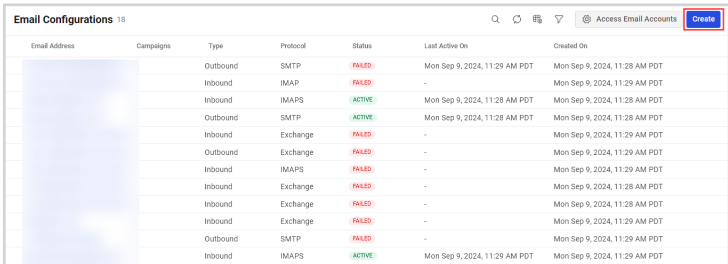
Creating Generic Digital Email Configurations

1 On the Admin Console home page, select the **Email Configurations** card or the **Manage Campaign** icon in the sidebar navigation.



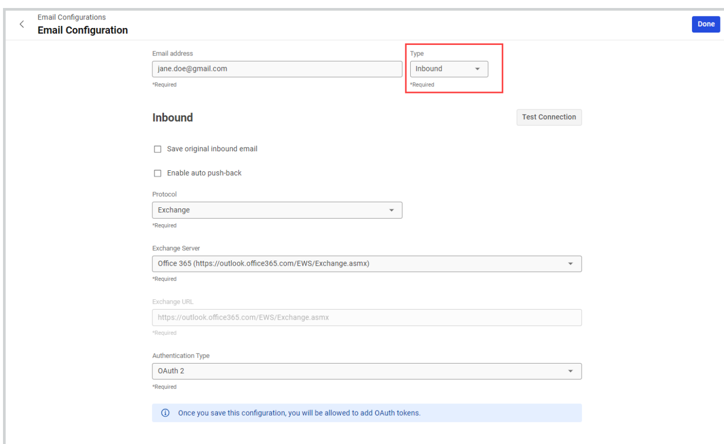
The **Email Configurations** page displays.

2 Select **Create**.



3 Enter your email address.

4 Select **Inbound** or **Outbound** and complete the fields as needed. The image shows Exchange selected as Protocol.



Field	Description
Save Original Inbound Email	Creates a new folder to store a copy of processed emails. **Disabled (default):** No additional folders are created and emails are deleted after processing. **Enabled:** Five9 creates a folder, Five9Processed_<ProfileName>, to store a copy of processed email interactions.
Enable Auto-pushback	Returns email interactions to the queue so that the interactions are reassigned if the agent who owns the interaction has not responded after the time specified in the Auto-pushback Interval field below.

> **Note**
> To edit an email configuration, select an email address from the Email Configurations page.

Digital Settings

Configure email delivery settings, routing, and download attachment settings. These settings apply to all campaigns enabled for chat and/or email.

> **Note**
> This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Assistances and assign permissions and permission sets.

> **Important**
> If you have not yet migrated to the Digital Admin Console, refer to Enable Global Settings in SCC Admin.

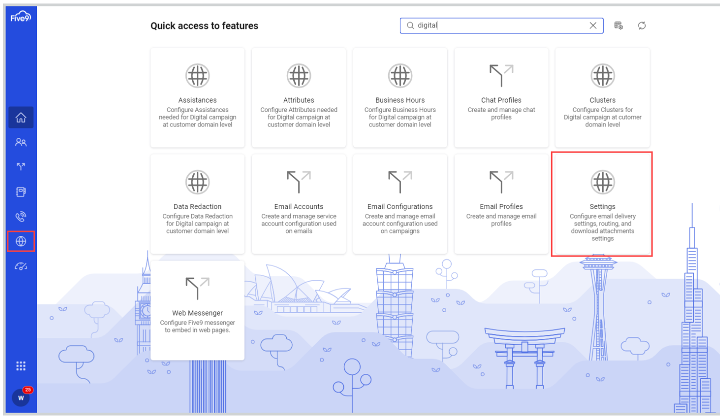
Use the following topics to configure Digital Settings in Admin Console.

Configuring Digital Settings
Digital Routing
Digital Email Notifications

Configuring Digital Settings

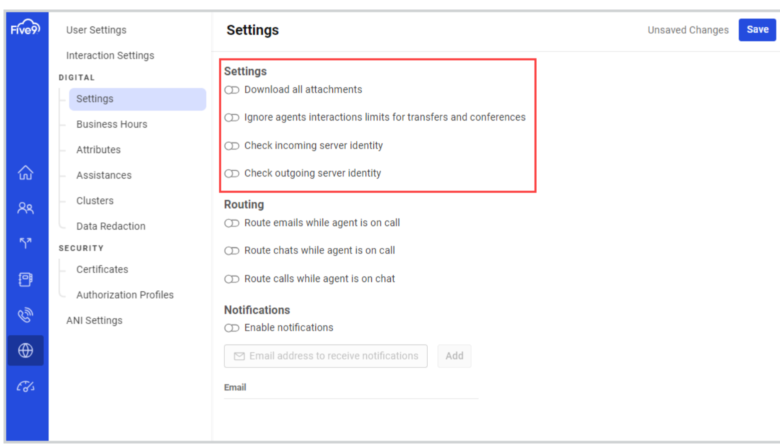
Upon successful login, you are presented with the **Admin Console** home page.

1. Select the **Settings** card or the **Manage Environment** icon in the sidebar navigation.



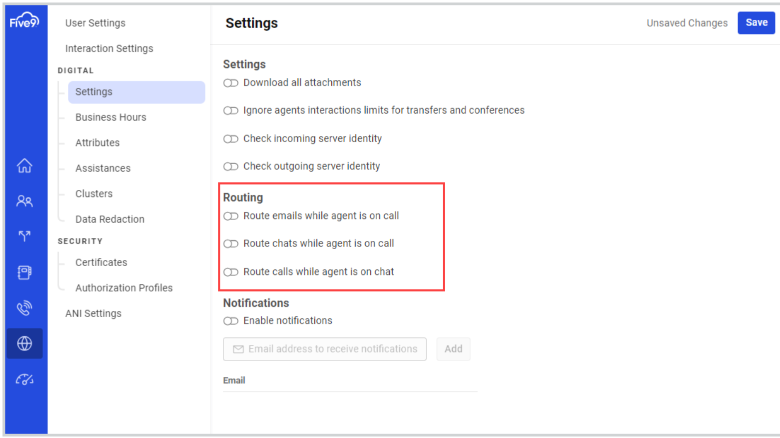
The **Digital Settings** page displays.

To override the number of concurrent digital engagements set in the VCC Administrator application, enable Ignore Agent Interaction Limits for Transfers. This action allows agents to receive additional email messages, chat conferences, and social interactions beyond the preset limits, ensuring that transferred interactions are automatically routed to the appropriate agents.



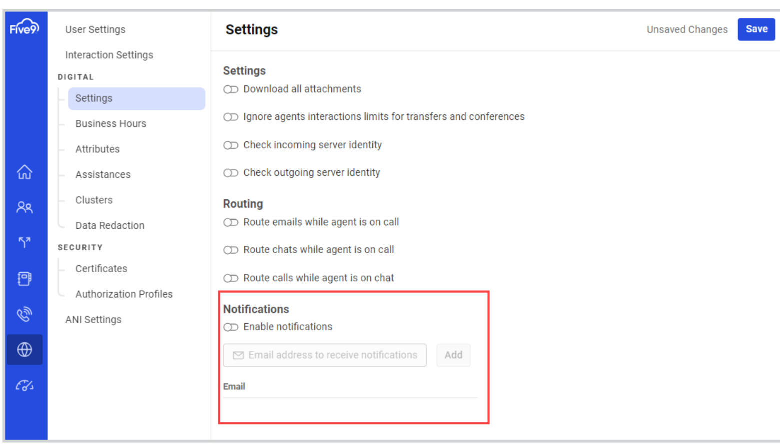
Digital Routing

Specify the interaction types to be distributed in this section.



Digital Email Notifications

Enable notifications for email account errors, such as expired tokens, expired passwords, or failed authentication, in this section.



You can configure notifications for up to 20 email addresses. Notifications are sent on the 1st, 3rd, 5th, and 7th days after an error is detected, with details specific to the error. If the configuration error persists beyond the 7th day, email accounts with the same settings for inbound and outbound email will be disabled.

To enable email notifications, follow these steps:

1 Select **Enable notifications**.
2 Enter a valid email address to receive notifications.
3 Select **Add**.
4 Repeat steps 2 and 3 to add up to 20 email addresses.
5 Select **Save**.

Digital Business Hours

Configure chat hours of operation and provide an after-hours message when you are unavailable. Allow customers to submit emails outside business hours via the chat console. This setting applies to all chat-enabled campaigns, except those with business hours defined in the associated chat profile.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Business Hours and assign permissions and permission sets.

Important

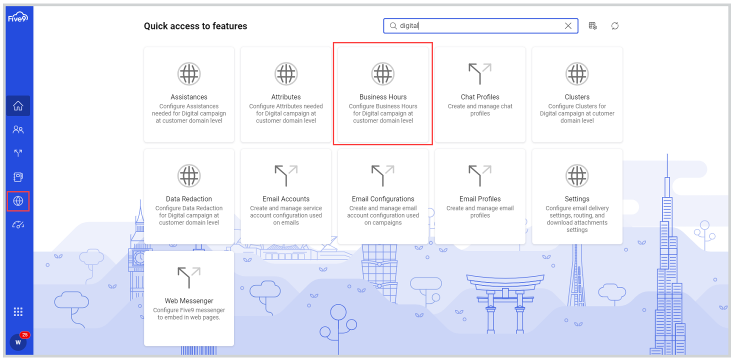
IIf you have not yet migrated to the Digital Admin Console, refer to Business Hours in SCC Admin.

Use the following topics to configure Business Hours in Admin Console.

Configuring Digital Business Hours of Operation

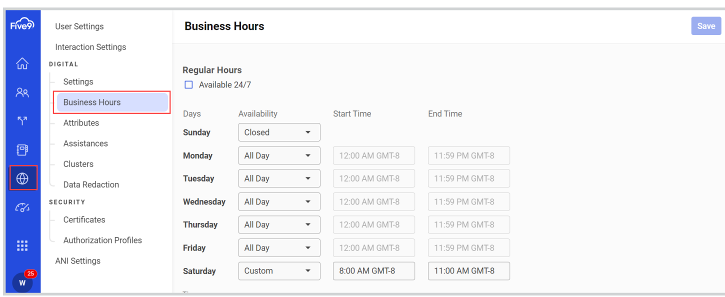
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Business Hours** card or the **Manage Environment** icon in the sidebar navigation.



The **Business Hours** page displays.

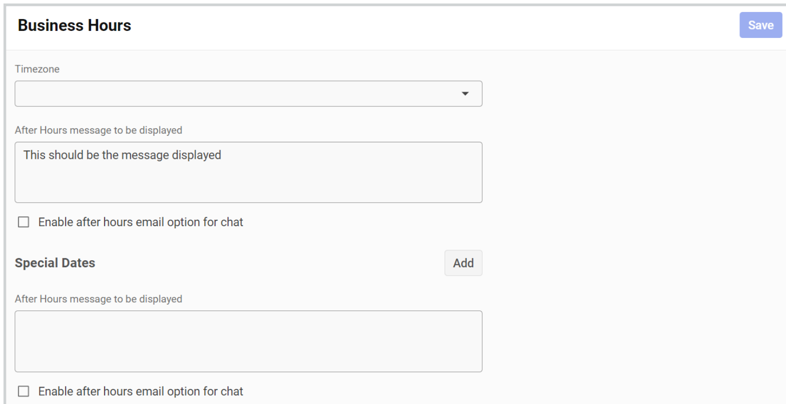
2 Modify the desired fields and set your Timezone.



Configuring Digital Special Dates and After Hours Messages

Users may require assistance outside of regular business hours. To provide continuous support, enable the after hours email option for chat inquiries. This feature allows users to reach out to our support team via email when live chat support is unavailable. To communicate that there is no service outside of your defined business hours, enter your message into the **After Hours message to be displayed** text box.

Define special days, such as holidays, using a specific time zone for each special day. Special Dates override predefined business hours on overlapping weekdays. Special messages replace standard messages during defined special dates or hours.



Digital Attributes

Tag interactions with predefined attributes to facilitate filtering for reporting purposes. Multiple attributes can be assigned to a single interaction.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Attributes and assign permissions and permission sets.

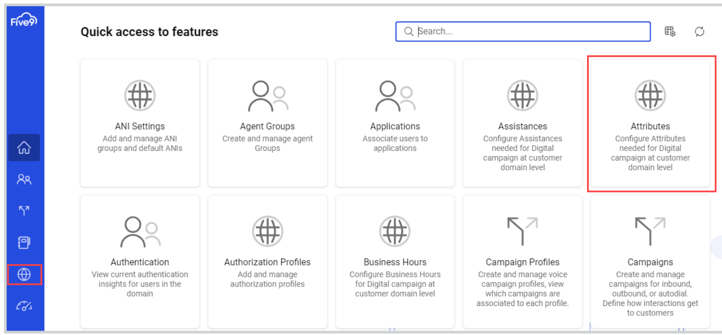
Important

If you have not yet migrated to the Digital Admin Console, refer to Attributes in SCC Admin.

Creating Digital Attributes

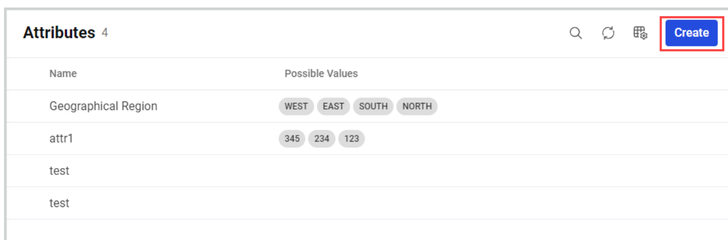
Upon successful login, you are presented with the **Admin Console** home page.

1. Select the **Attributes** card or the **Manage Environment** icon in the sidebar navigation.

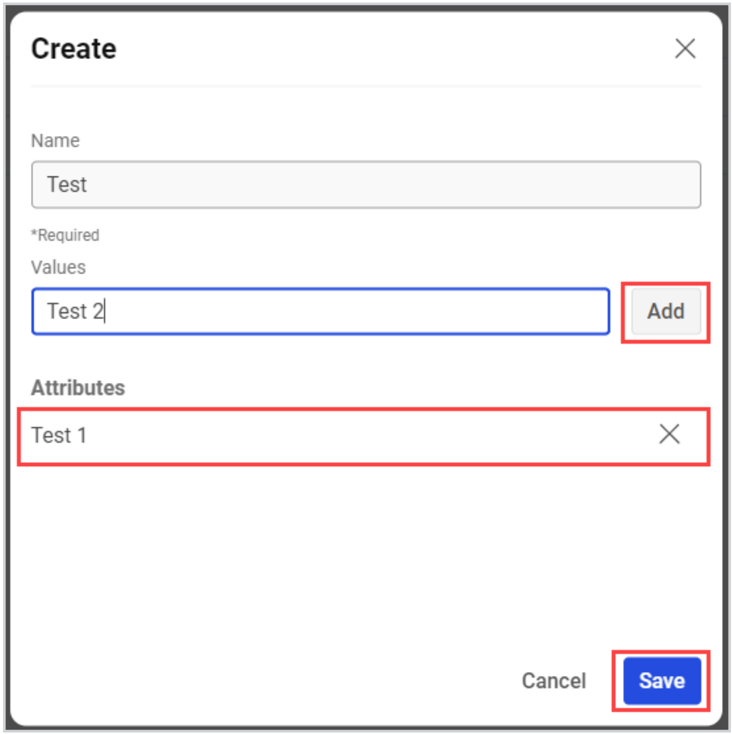


The **Attributes** page displays.

2 Select **Create** and enter the name and values of the attributes.

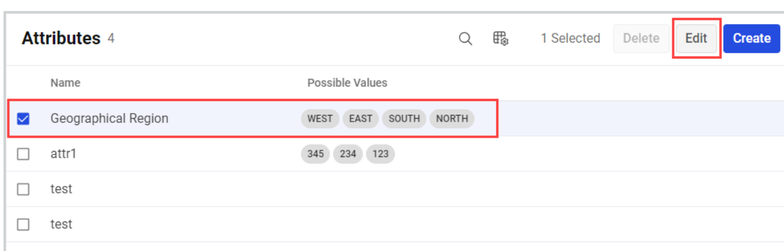


3 Select the **Add** button to add the Attributes to the Values field.



4 Select **Save**.

To edit the values, select a value in the table and then the **Edit** button.



Digital Assistances

Assistances are predefined responses used in chat, email, or social media interactions to provide consistent and accurate answers to customer inquiries. Designed for typical questions and common scenarios, assistances streamline workflows by saving time and effort.

These responses are essential for routine interactions, ensuring uniformity and efficiency, and enhancing the customer service experience. For example, an assistance may include step-by-step instructions for resetting a password or a link to detailed guidelines.

By using assistances, you can efficiently manage repetitive tasks, allowing you to focus on more complex customer needs.

Note

Assistance responses do not pass inline images for all email providers.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Assistances and assign permissions and permission sets.

Important

If you have not yet migrated to the Digital Admin Console, refer to Assistances in SCC Admin.

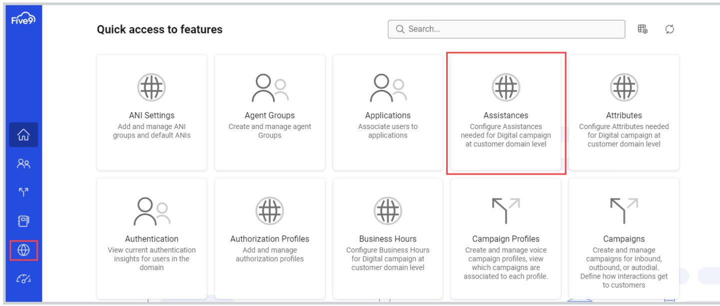
Use the following topics to create Digital Assistances in Admin Console.

Creating Digital Assistances
Associating a Digital Assistance with a Profile

Creating Digital Assistances

Upon successful login, you are presented with the **Admin Console** home page.

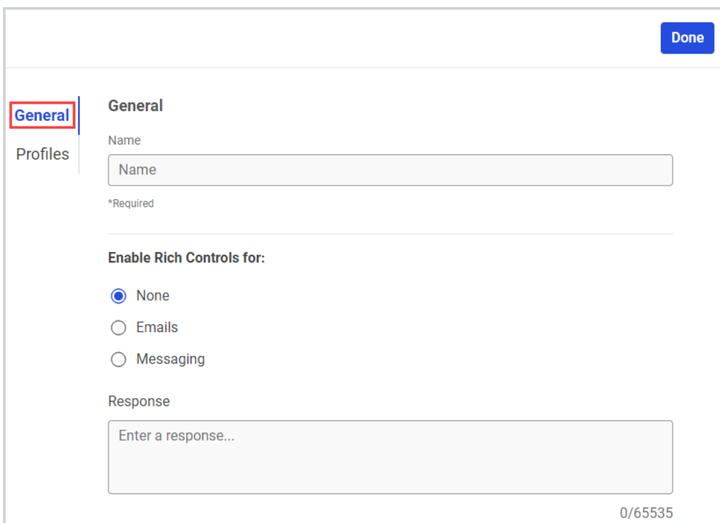
1. Select the **Assistances** card or the **Manage Environment** icon in the sidebar navigation.



The **Assistances** page displays.

2 In the General tab, enter the name and the text of the assistance, including links to text or images in a URL.

3 Enable rich text for email or rich controls for messaging to display available text formatting options. You can add variables to the response box.



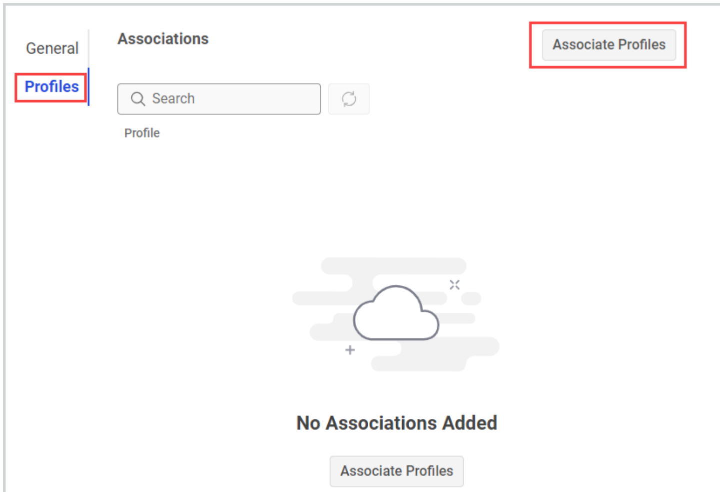
> **Note**
>
> The numbers below and to the right of the response box indicate the number of characters used so far and the maximum number of available characters (65535).

4 Select **Done**.

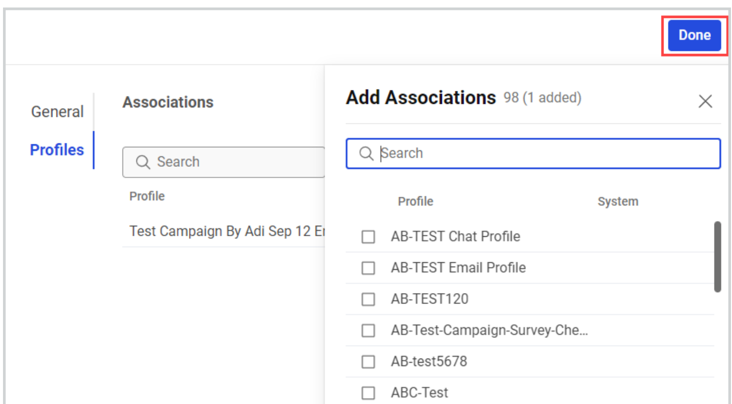
Associating a Digital Assistance with a Profile

To associate an assistance with a profile:

1 In the **Profiles** tab, select the **Associate Profiles** button.



2 Select a profile from the list and select **Done**.



Digital Clusters

Digital Clusters identify issues or trending topics based on keywords associated with profiles. These profiles track the progress of outreach to customers and authors of incoming media posts. Use Clusters to tag, categorize, and filter interactions based on static business-related topics or Persistent Business Categories that your company regularly manages.

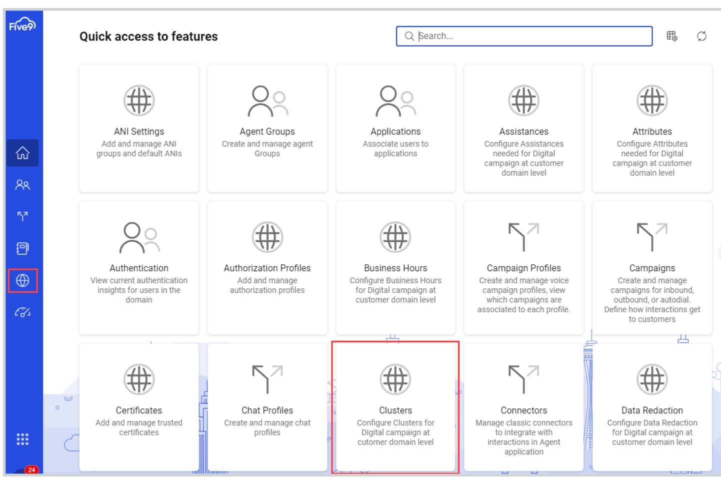
To create a cluster, select the **Cluster** tab. Select **Add**, then enter the name of the cluster. The **Tag** and **Classification** fields are not used.

> **Note**
> This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Clusters and assign permissions and permission sets.

Creating Digital Clusters

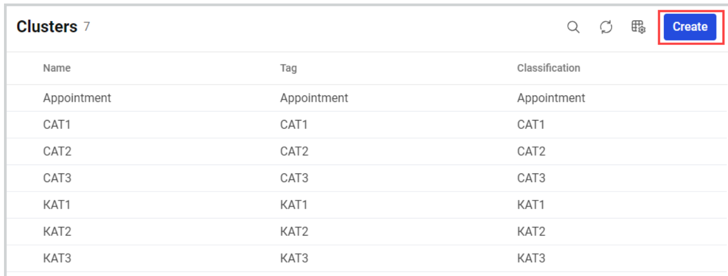
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Clusters** card or the **Manage Environment** icon in the sidebar navigation



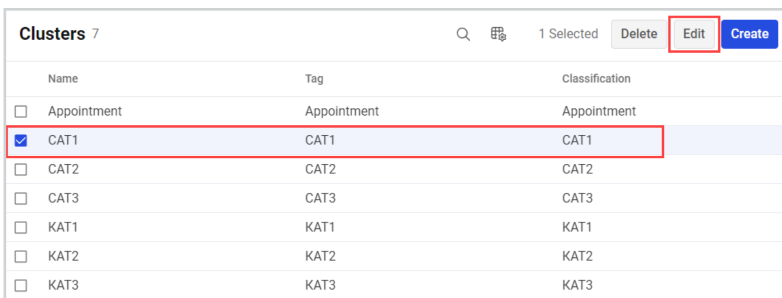
The **Clusters** page displays.

2 Select **Create** and complete the necessary fields.



3 Select **Save**.

To edit the clusters, select a cluster in the table and then the **Edit** button.



Digital Data Redaction

Data redaction removes sensitive information from digital interactions. You can define and associate custom data redaction rules with your profile. System data redaction rules in the Administrator Console are read-only. In the Administrator Console, you can select, deselect, and create redaction rules using the Data Redaction card. Create custom rules using RegEx expressions to define the sequence.

Note

This is a reminder that before you begin, you must log in to Admin Console. Here, you can enable Data Redaction and assign permissions and permission sets.

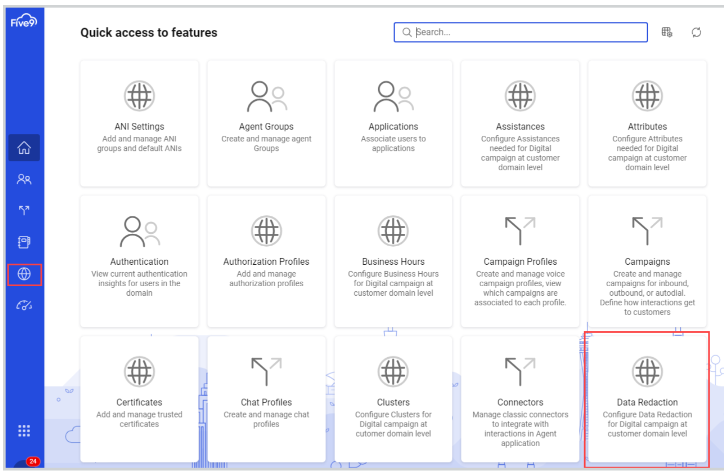
Important

If you have not yet migrated to the Digital Admin Console, refer to Data Redaction in SCC Admin.

Creating Digital Data Redaction Rules

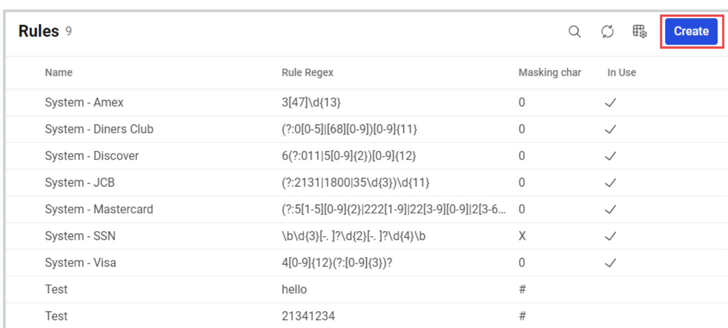
Upon successful login, you are presented with the **Admin Console** home page.

1 Select the **Data Redaction** card or the **Manage Environment** icon in the sidebar navigation.



The **Rules** page displays.

2 Select **Create** and complete the necessary fields.



3 Select **Save**.

Configuring Digital Engagement Channels

Configuring the VCC Administrator Application

Your VCC campaign must be created in the VCC Administrator application. When you save the VCC configuration, the campaign is synchronized with the profile in the Digital Engagement Administrator console.

Important

Digital engagement channel interactions that result in a **Closed by IVR** disposition will have no transcript attached to associated reports.

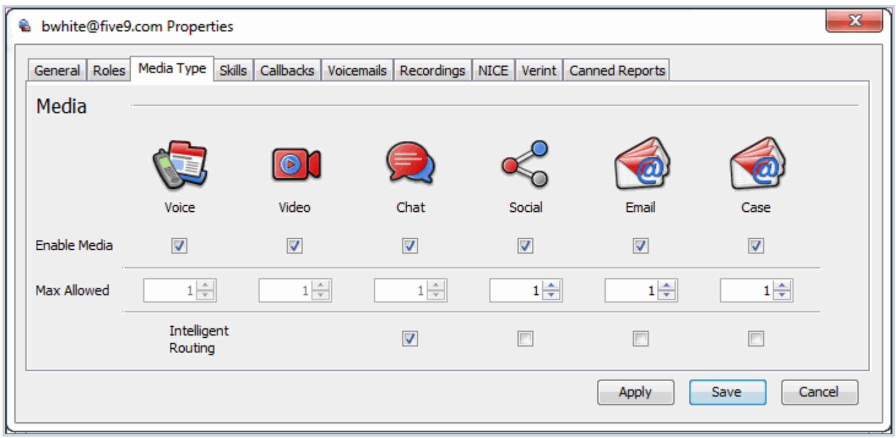
Setting the Media Types for Digital Engagement Channels

For each user, you can define the allowed types of interactions. Depending on their assigned skills, agents can interact with your customers through voice and any combination of digital engagement channels. Agents respond to incoming requests coming from email, chat, or social tools, such as Facebook and Twitter. Digital engagement channels are available only in inbound campaigns. Voice interactions can be configured in inbound and outbound campaigns.

If your contact center uses digital engagement channels in addition to voice, specify which channels each agent can use and the maximum number (Max Allowed) of each type of interaction that the agent can have at any time. In this example, the agent is allowed to engage in all media channels.

Important

Agents assigned a video channel may be allowed a maximum of one chat because video sessions use chat to route customer video requests.



If Intelligent Routing is enabled for the digital engagement channels, incoming interactions are automatically presented to the agent to accept or reject until the specified maximum number is reached. If Intelligent Routing is not checked, the agent can select interactions manually (or *cherry pick*) from the queue. In this example, Social is enabled so the agent may select a new social request from the queue if the agent has not reached the specified limit. For more information about media settings using Five9 Engagement Workflow, see **Five9 Engagement Workflow**.

Five9 recommends that you do not mix in the same queue or profile agents who use intelligent routing and choose interactions manually.

Example

If agents are assigned to ACME Support skill, all agents should use the same mode to receive interactions. A mixture of AID and manual assignment may result in conflicts when one agent attempts to manually select an interaction that is delivered to another agent in AID.

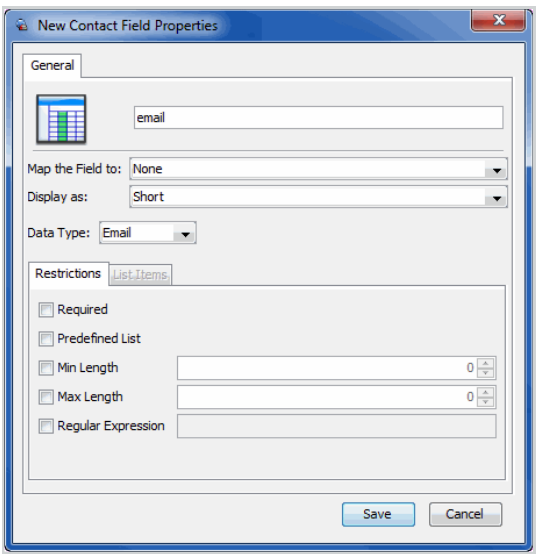
Adding an Email Contact Field

To identify your digital engagement channel interactions, create a contact field named `email` if one does not already exist.

> **Important**
> If your domain already has a field of type email but with a different name, such as E-mail or Email, contact your Five9 support representative to request that your email field name in Digital Engagement Channels Tenant be mapped to your custom email field name. It is important that you create only one field with the email field type for digital engagement use.

1 In the VCC Administrator application, navigate to **Contacts > Fields**.

2 Create a field labeled `email` and of **Data Type: Email**, and click **Save**.



Configuring the Digital Engagement Console

Although you can log into the console with Firefox, Five9 recommends Google Chrome.

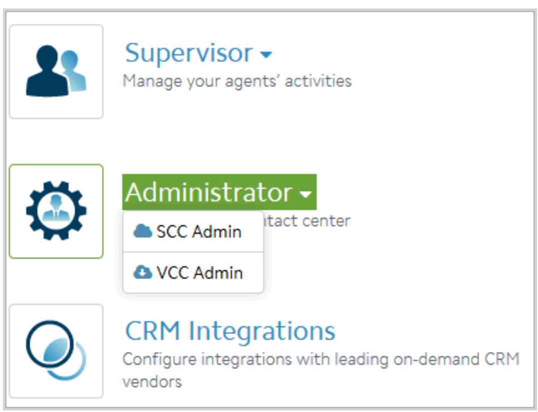
> **Important**
> Only run one instance of the SCC Admin Console per browser window.

Logging in to the Digital Engagement Administrator Console

Before configuring the console, request that Customer Support enables your domain and provides a domain administrator account for the Digital Engagement Console.

1 To log into the console, log into your Five9 account.

2 Click Administrator, and select SCC Admin.



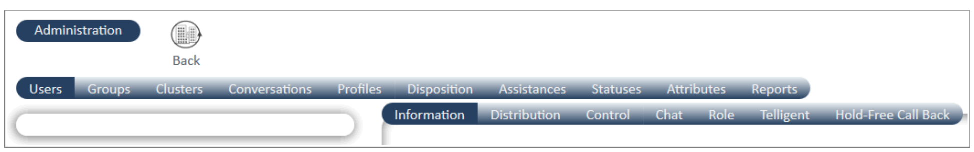
3 Enter your SCC credentials. Use the format [domain name/VCC user ID], like *Five9/MyVCCUserID*.

> **Note**
> The domain name and the VCC user ID are case-sensitive.

Note

SCC Administrators must have VCC Administrator role to access the Digital Engagement Administrator Console.

You may now navigate the Digital Engagement Administrator Console.



Troubleshooting Access to the Digital Engagement Administrator Console

To troubleshoot and correct access problems that you may encounter when logging in to the Digital Engagement Administrator Console, follow these steps.

1. Confirm the URL and credential format that you are using to gain access.
2. Ensure the URL is provided through the Five9 login page, not a direct address bar entry.

   Access to the Digital Engagement Administrator application login page is granted using the VCC domain credentials.
3. Verify that your credentials are in the format [domain name/VCC user ID], like *Five9/MyVCCUserID*.

Note

The domain name and the VCC user ID are case-sensitive.

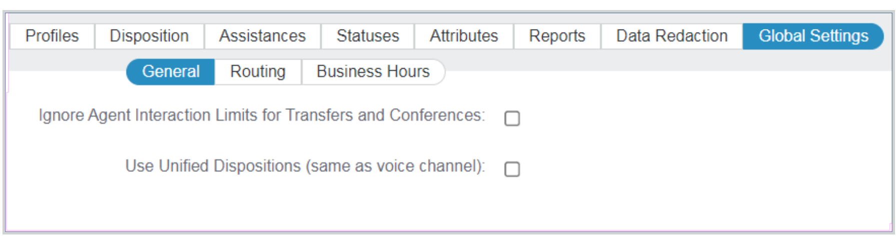
To verify that the user account you are using is associated with a user profile, follow these steps.

1 Log in to the **VCC Administrator** application.
2 Open the **User Profiles** folder.
3 Double-click the user profile name where the user with SCC permission was added.
4 Remove the user and click **Save**.
5 Add the user back to the same user profile and click **Save**.
6 Log in to Digital Engagement Administrator by using the correct format.

Enabling Global Settings

In this tab, you can enable interaction limits and unified dispositions for all your agents.

Configuring General Interaction Settings



Although you set the number of concurrent digital engagement interactions for agents in the VCC Administrator application, you can override this number to allow additional email messages, chat conferences, and social interactions to be transferred to agents who receive interactions automatically. To do so, enable **Ignore Agent Interaction Limits for Transfers**.

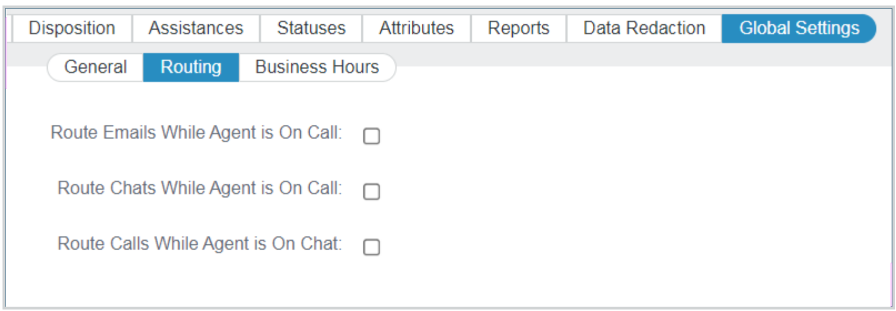
Example

An agent who is allowed five concurrent email interactions is currently assigned five interactions. If you enable this feature, an email (sixth interaction) can be transferred to the agent.

The **Use Unified Dispositions (same as voice channel)** option in the Global Settings turns on unified dispositions for all profiles in the domain. This feature allows you to use the VCC disposition that you also apply to calls. **Once you enable this option, you cannot revert.**

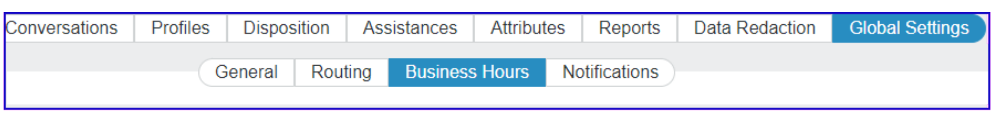
Configuring Global Routing Settings

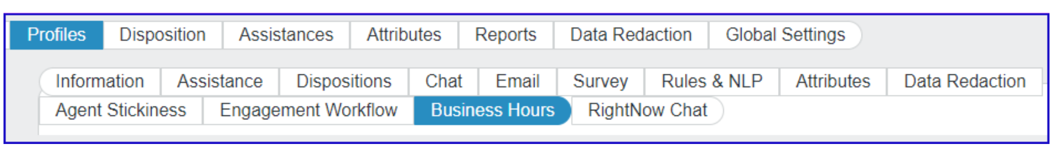
You can specify the interaction types to be distributed in the **Global Settings > Routing** tab.



Configuring Business Hours

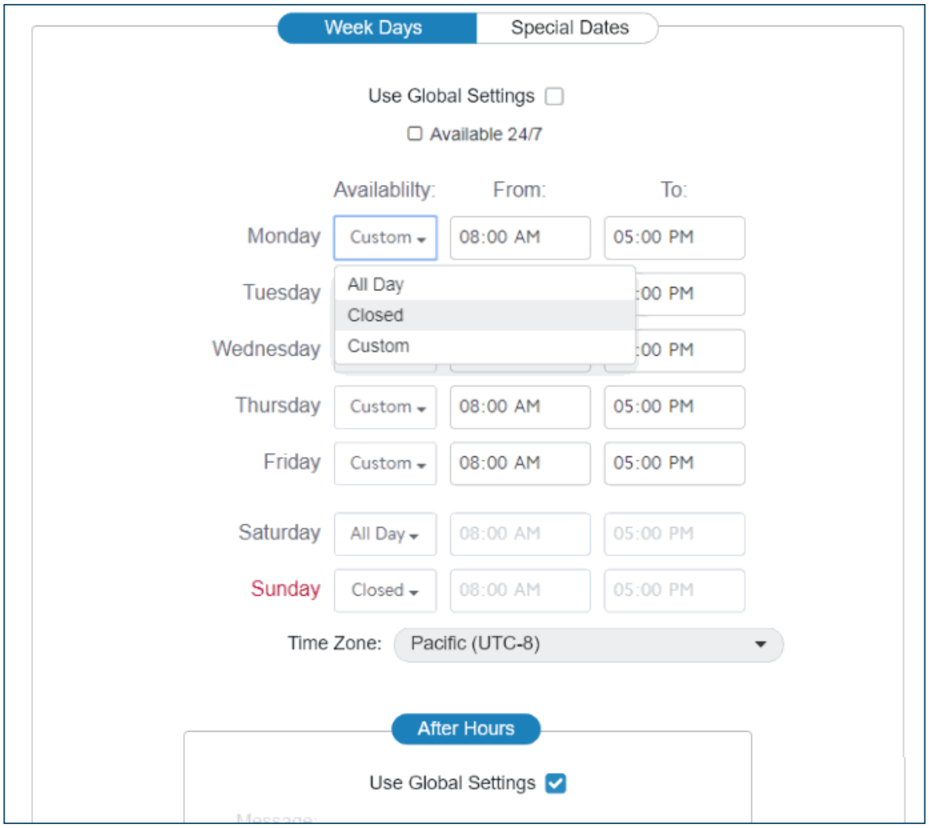
You can configure business hours of operation globally for your domain and uniquely for any specific profile, such as chat or email. To configure global business hours, navigate to **Global Settings > Business Hours**. To configure profile business hours, navigate to **Profiles > Business Hours**.





You can define your messaging hours of operation to include an after-hours message (see Configuring the No Service After-Hours Message) and waiting message (see **Wait Message: If configured, this message is displayed while the customer is waiting to be connected to an agent.**) when agents are unavailable. Also, you can enable web chat customers to submit an email outside of business hours by adding an email button (see Adding an Email Button) to your chat console. Email option does not apply to SMS messaging.

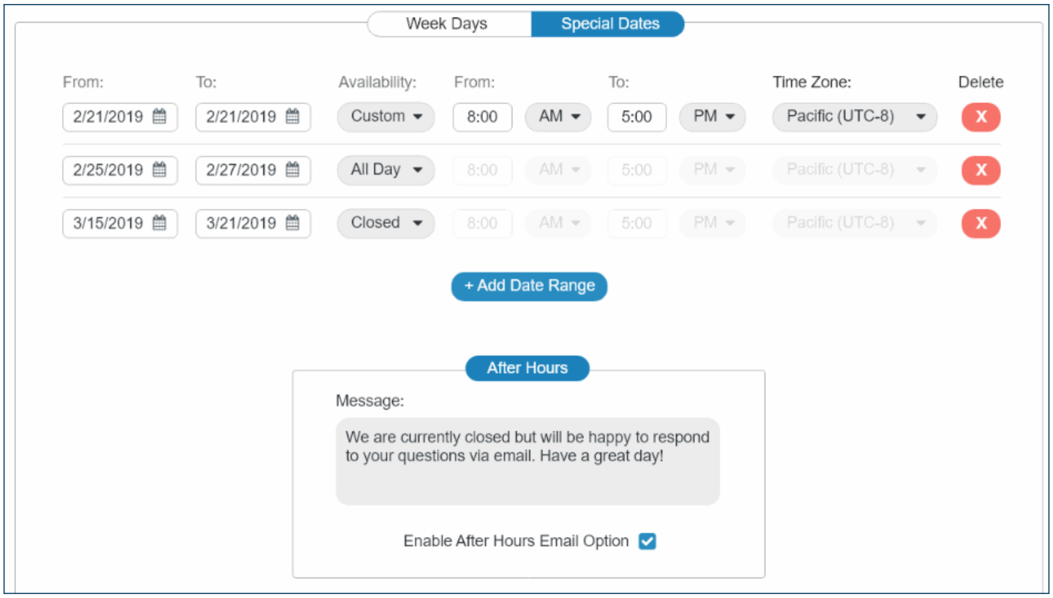
To override any profile setting with global settings, click **Use Global Settings**. By default, the global settings hours are configured to fully open, or all day every day. If no custom message is defined in the Global Settings tab, the After Hours message in the Business Hours tab is shown.



To define special dates, such as holidays, click **Special Dates**. You can add multiple special date ranges and delete these individually.

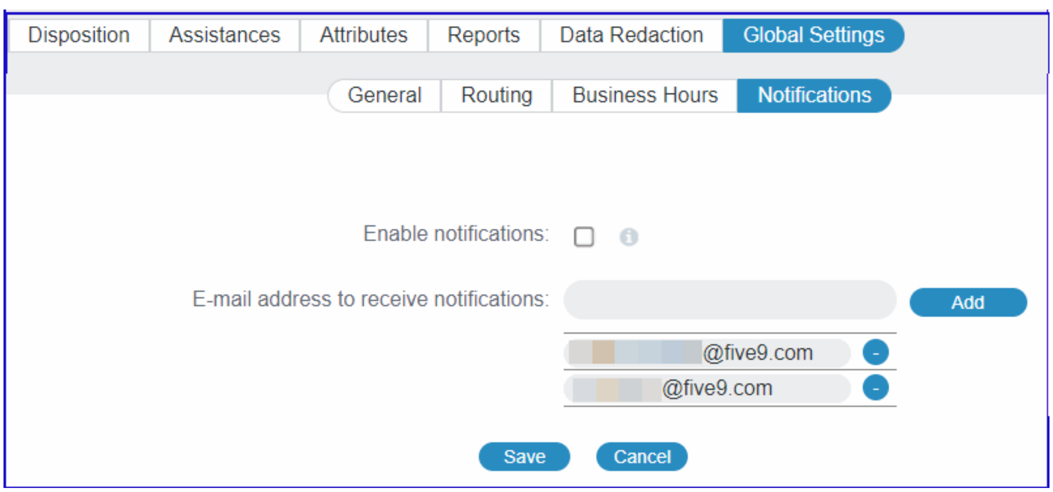
You can configure unique after-hours messages for Weekdays, Special Dates, and Global Settings. Special Dates always supersede pre-defined business hours for weekdays that share the same schedule. Similarly, special messages supersede standard messages when the special dates/hours are defined for the same period.

Standard business days and/or hours can be created in a single time zone, such as your domain time zone, for all seven days. You can define special days, such as holidays, using a specific time zone for each special day definition.



Configuring Email Error Notifications

You can enable notifications for email account errors, such as an expired token, expired password, or failed authentication, in the **Global Settings > Notifications** tab.



You can configure notifications for up to 20 email addresses. Notification is sent on the first, third, fifth, and seventh days after error detection and is specific to the error. Email accounts that have the same settings for inbound and outbound email are disabled when the configuration error remains after the seventh day.

To enable email notification, follow these steps:

1 Click to set **Enable notifications**.

2 Provide a valid email address to receive notifications.

3 Click **Add**.

4 Repeat steps 2 and 3 to add up to 20 email accounts.

5 Click **Save**.

Displaying the Distribution of a User's Interaction Methods

Digital engagement interactions are distributed from queues to agents by one of these methods: Automatic Interaction Distributor (AID) or manual selection by the agent (*cherry pick*). You can use only one method for each agent at any time.

> **Note**
> You cannot use manual selection with preview chat, which is a type of proactive chat. For more information about chat types and configuration, see **Understanding Chat Types**.

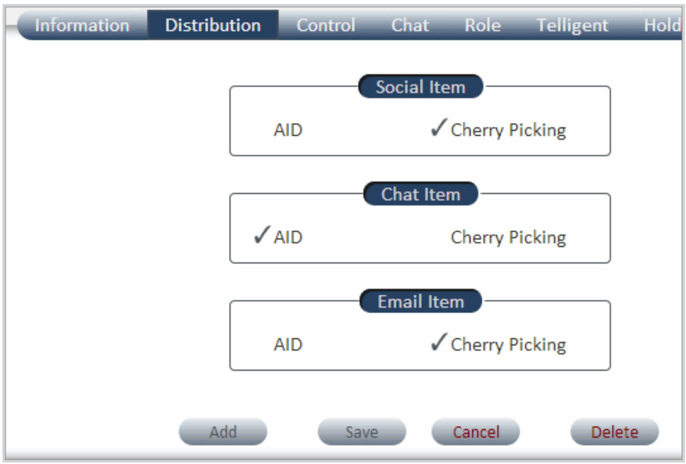
Automatic Distribution

Automatic Distribution is similar to the Automated Call Distributor used for voice interactions. It pushes items to an agent when agents become available if they have the skill. digital engagement interactions are routed to agents in a round-robin fashion based on the longest agent waiting time. Currently, preview chat is supported in AID mode only. When an agent receives a chat preview, they are able to select the contact details and journey as a part of this preview for review before making a decision to engage with the contact.

Manual Distribution

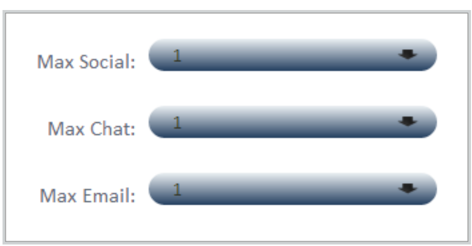
Agents are allowed to view the Media Stream queue and select items one at a time. Agents can use their Settings menu to change the sort order of items in the Queue Media Stream or the Assigned Media Stream. Agents can change this setting in the Text Filters menu.

In the selector panel in **Users** > **Distribution**, you can display the distribution method defined for digital engagement interactions, but you can change these settings only in the VCC.



Displaying Agent Interaction Capacity

In the **Users** > **Control** panel, you can see the maximum number of digital engagement interactions an agent may handle at any one time. Change these settings only in VCC Administrator. See Setting the Media Types for Digital Engagement Channels for instructions.

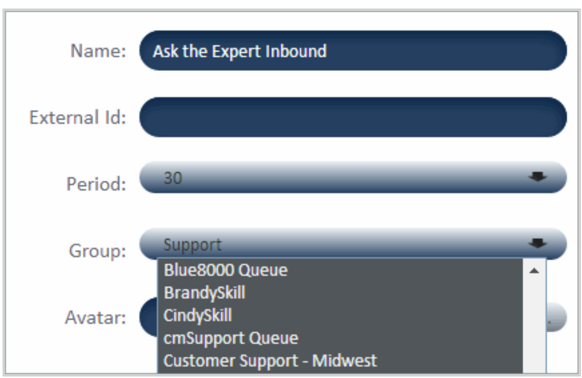


Creating Profiles

This section describes basic features of a profile in the **Information** tab. Profiles in the Digital Engagement Administrator console are equivalent to and synchronized with the campaigns defined in the VCC. Do not change campaigns in the Digital Engagement Administrator console except to associate a group to a profile.

Associating a Group to a Profile

You must manually associate a group to a profile. Select a group from the menu.



Accepting Interactions Automatically

The **Auto Accept** option automatically accepts interactions on behalf of agents. When this option is selected, the timer is disabled. Agents automatically receive interactions in their assigned queues. Agents cannot reject the interactions.

In addition, if manual selection is enabled, interactions are added to their list of assigned interactions and open in their application when agents click the browser notification of a new digital engagement interaction. To prevent agents from automatically accepting new interactions when they click browser notifications, select one of these options:

- Disable browser notifications (see **Managing Browser Notifications for Agents** and Agent Desktop Plus User's Guide).
- Disable **Auto Accept** for one or more channels.

Setting the Time to Accept Interactions

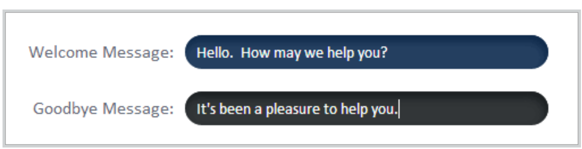
Agents must accept interactions within a specified number of seconds. The **Time to Accept** setting applies to the AID mode, which can be set for each interaction type. The default setting is 30 seconds. You can increase the time up to 60 seconds.

Setting the Priority of Digital Engagement Interactions

When routing interactions by priority, the default value for email and social interactions is 300 seconds. For chat interactions, the recommended value for existing profiles is 300 seconds. New profiles are automatically set to 300 seconds.

Defining Your Chat Welcome and Goodbye Messages

If you want to use chat messages different from those defined in the profile, enter the text for your chat Welcome and Goodbye messages.

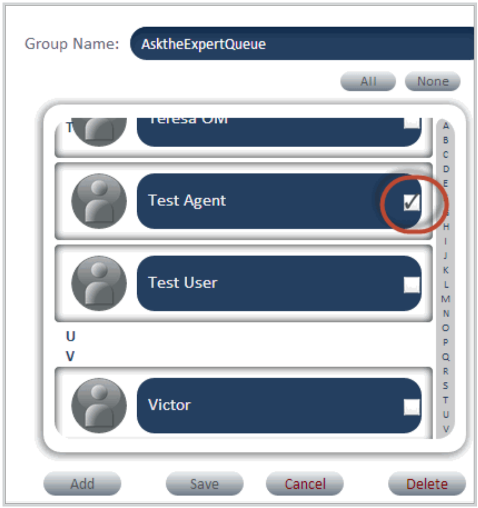


Verifying a User's Group Association

A group in the Digital Engagement console is equivalent to a queue (skill) in the VCC. The agent must already be assigned to the equivalent queue in the VCC administrator application.

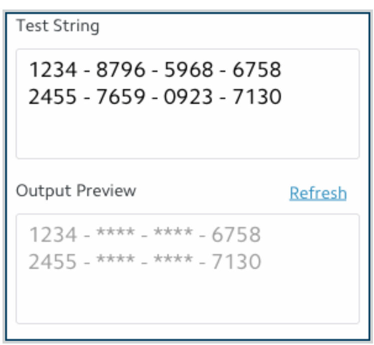
When the VCC settings are synchronized to the Digital Engagement Administrator console, user definitions are associated with a group. You may want to associate users with a certain group, which is helpful to distribute agents to assist with the workload of a different group. To distribute agents, you must do so in the VCC Administrator or Supervisor application where you can also add and remove skills.

Select the Group from the list on the left. You should see the boxes checked for each user you want to see in that group.



Configuring Data Redaction Rules

Five9 data redaction removes sensitive information from digital engagement channel interactions. You can define data redaction rules and associate them with your SCC profile. The example below shows sensitive data replaced with asterisks.

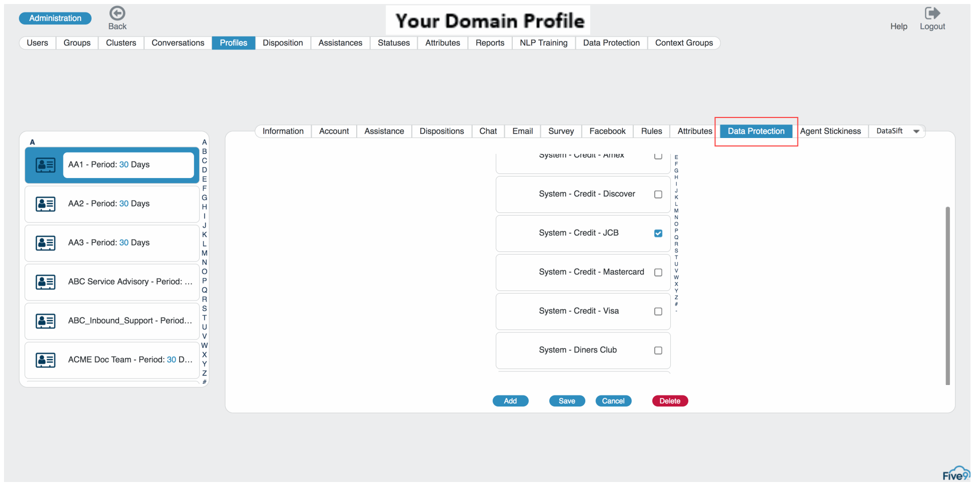


System data redaction rules are present in the SCC Administrator application and are read-only, you may not edit or delete system rules. You can select, deselect, and create rules in the **Data Redaction** tab of your SCC Administrator interface.

Adding System Redaction Rules to a Profile

To assign system redaction rules to your profile, follow these steps.

1 In the SCC Administrator application, choose your profile and click the **Data Protection** tab.

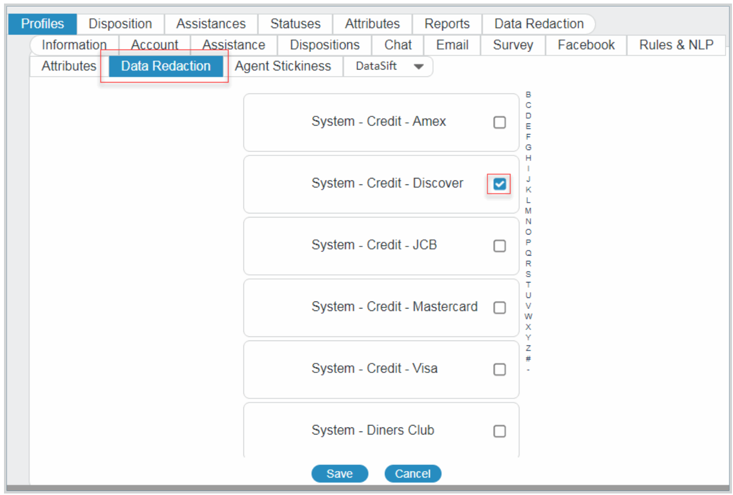


Predefined rules for the following providers and formats:

- American Express
- Diners Club
- Discover
- JCB
- MasterCard
- Visa
- Social security number

2 To see the details for any rule, click the name of the rule.

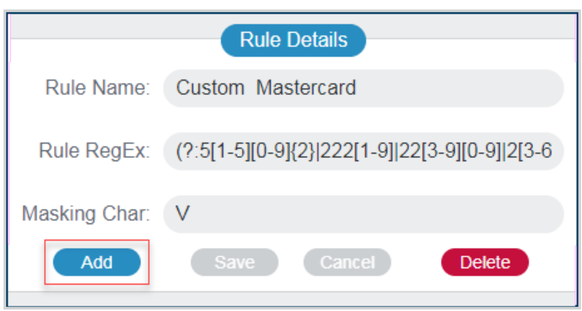
3 To apply a predefined rule format to your Five9 SCC profile, enable that rule.



4 Click **Save**.

Creating Custom Data Redaction Rules

You can create data redaction rules mask any standardized information that you choose using a RegEx expression to define the sequence.



To create a new data redaction rule, follow these steps:

1 Assign a unique rule name.

Five9 recommends using **Custom** as a preface to your rule name to simplify locating your custom rules.

2 Enter a regular expression.

> **Note**
> You must verify your expression before committing to the SCC Administrator console. Five9 does not provide any RegEx validation.

3 Assign a masking character.

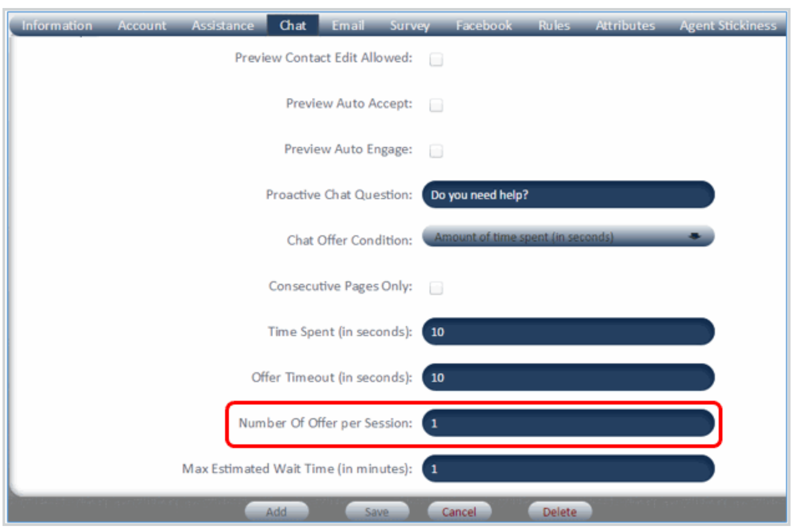
The masking character is the character used to replace the redacted data. You may select any alphanumeric character, or hash (#), or asterisk (*), as the masking character.

4 When your rule definition is complete, click **Add**.

You can edit or delete custom rules at any time.

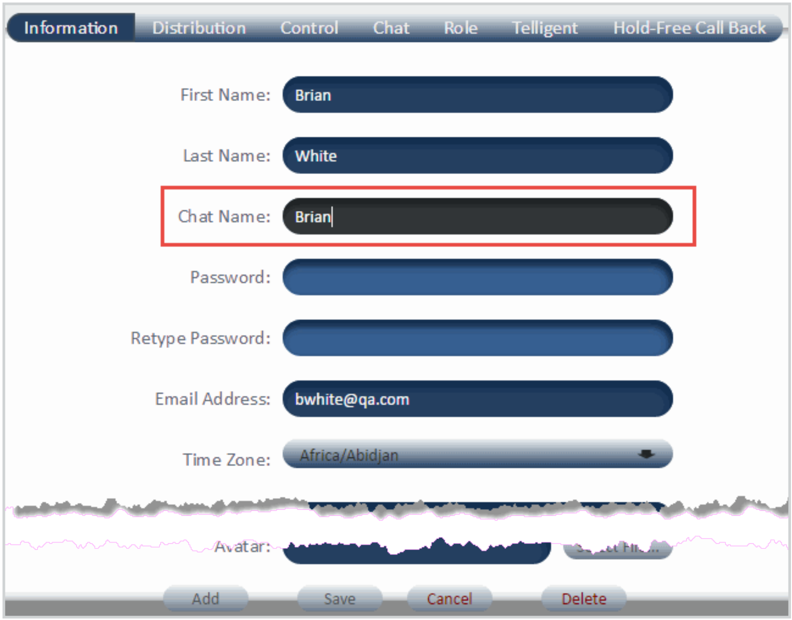
Configuring the Number of Chat Offers for Each Session

To set the number of proactive chat offers, enter a number in the chat properties of a profile as shown below.



Configuring the Chat Display Name

You can assign a custom chat display name for your agents.

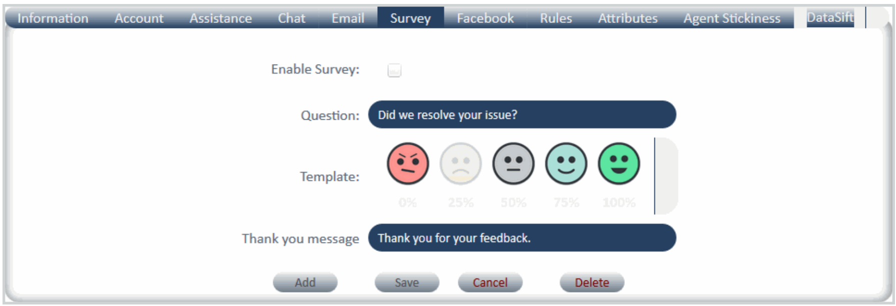


Monitoring Digital Engagement Interactions and Activity

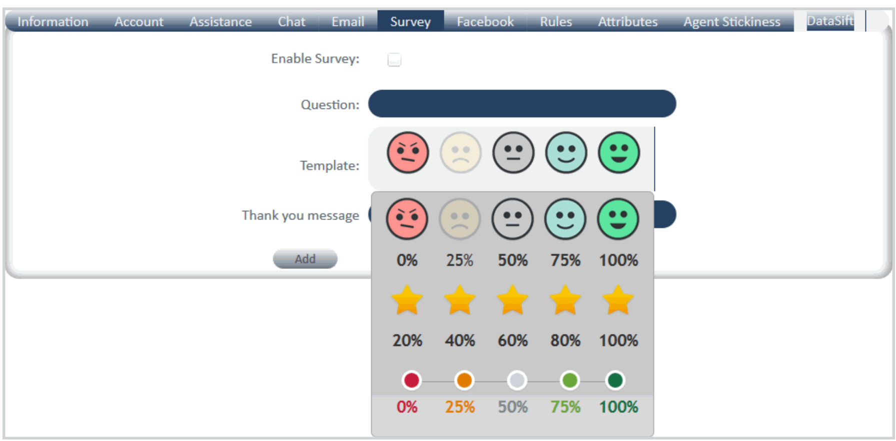
This section describes how to monitor and track your digital engagement interactions and activities.

Customizing a Survey to Collect Feedback

After each digital engagement interaction, you can ask the customer to complete a survey. You can customize the survey question for each profile. You can see the survey results in the Social Reports of the Dashboards and Reports Application.

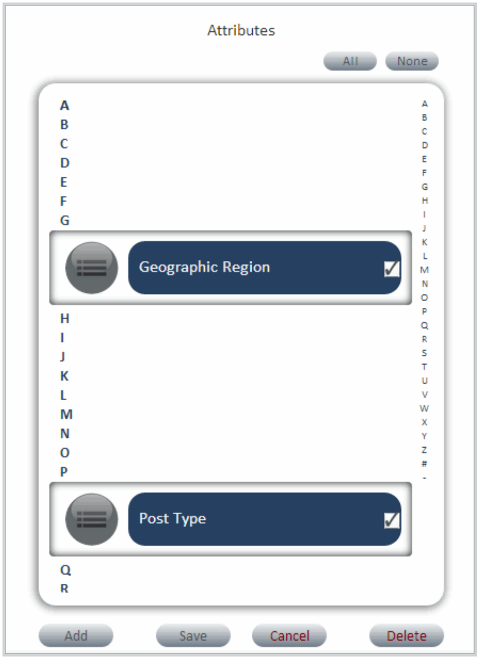


You can also select a template for your rating scale in the survey. Click the down arrow in the Template field:



Gathering Interaction Metrics with Profile Attributes

You can assign predefined attributes to a profile. The attributes help you gather metrics about the authors of text posts and processed by the agents assigned to the profile. In the **Profiles** > **Attributes** tab, select the profile from the profile list on the left, and check the attribute definitions you want to assign to the selected profile.



To create attribute definitions, see **Defining Attributes for Agents to Tag Text Items**.

Defining Agent Stickiness for Distributing Interactions

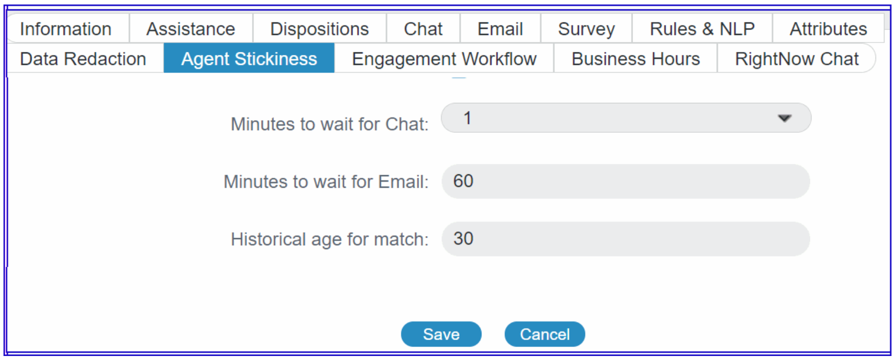
For each profile, you can define how the system assigns digital engagement interactions for returning contacts. For new contacts, the system ignores these settings and routes the item to the next available agent.

This feature enables the system to manage the distribution of digital engagement interactions instead of the ACD. Before an item is distributed, the system determines which agent assigned to that profile handled the previous interaction with the returning contact, within the time range of the configured **Historical age for match**. If that agent becomes available within the configured **Minutes to wait** (for chat or email), the interaction is offered to that same agent.

Once the **Minutes to wait** (for chat or email) timer has expired, or if the assigned agent rejects or ignores the interaction, it is returned to the queue for distribution. If an agent logs out while there is an offered sticky interaction, the interaction will be returned to the queue after **Minutes to wait** (for chat or email) timer has expired.

Note
An agent logged in with cherry-pick mode can lock an interaction while it is being offered to another agent due to stickiness. Agent stickiness settings do not consider business hours.

Go to **Profiles > Agent Stickiness**.



Enable	Enables Agent Stickiness.
Minutes to wait for Chat	Maximum time to wait for the previous agent to become available and receive the chat interaction.
Minutes to wait for Email	Maximum time to wait for the previous agent to become available and receive the email interaction.
Historical age for match	Number of days to search the contact’s history to locate the last agent who handled the previous interaction with the contact. If the interaction is older than the setting, Agent Stickiness is not applied. This setting is a sliding 24-hour window and refers to calendar days. This setting does not consider business hours or holidays.

Configuring Dispositions in Admin Console

This topic describes how to configure dispositions in Admin Console.

> **Note**
>
> If your domain existed before R12 and you have not enabled unified dispositions, see **Configuring Dispositions in SCC** .
>
> Early releases support configuring dispositions in both SCC and VCC. Release 13 and later support configuring dispositions in VCC or Admin Console. Refer to Adding Custom Definitions in VCC in Basic Configuration for steps in creating a new custom disposition in VCC. New domains should have unified dispositions only.

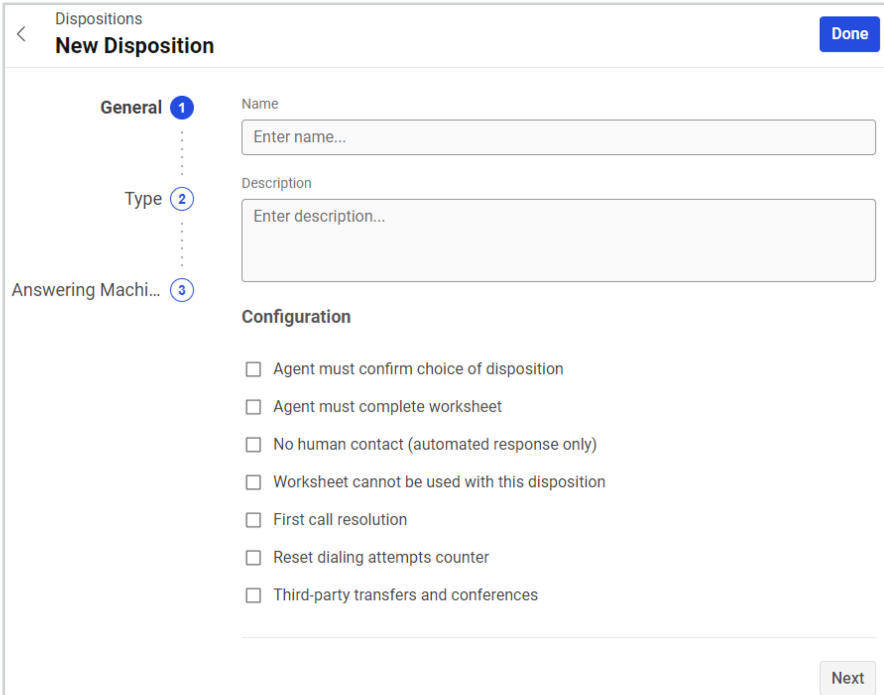
This topic includes steps for completing the following disposition configuration sections:

- **General Information**
- **Type**
- **Answering Machine**

To configure a custom disposition in Admin Console, go to **Manage Campaigns** > **Dispositions** and click **Create**:

General Information

In **General**, complete **Name**, **Description** and select the **Configuration** options.



1 Enter a unique name and description for the disposition.

2 Select the options to enable:

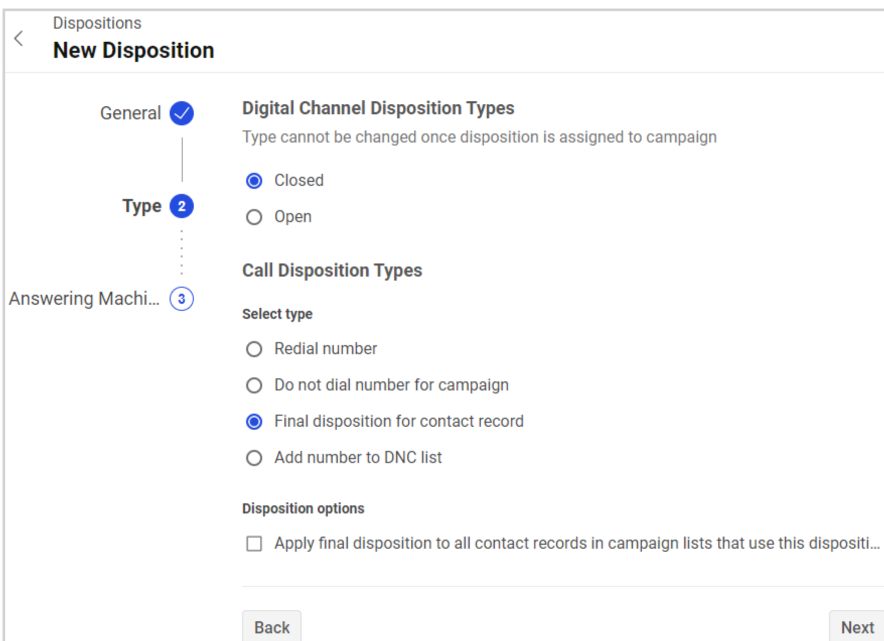
Option	Description
Agent must confirm choice of disposition	Requires that agents confirm the choice of disposition.
Agent must complete worksheet	Requires that agents complete a worksheet before this disposition can be selected.
No human contact (automated response only)	Increases the dropped call percentage and Dialer Drop Call % rates (abandoned call rates) for reasons other than not connecting to live parties.
Worksheet cannot be used with this disposition	Ensures that agents cannot use this disposition if they have completed a worksheet for the current call.
First call resolution	Includes the call in your first call resolution statistics for supervisors or

Option	Description
	reports.
Reset dialing attempts counter	Dispositions reset the dial attempts counter back to zero.
Third-party transfers and conferences	Optionally allows transfer or conference to a specific number before assigning the disposition.

3 Click **Next** to configure the disposition type.

Type

In **Type**, complete digital and call disposition types:



Digital Channel Disposition Types

Digital engagement channel dispositions apply to email, chat, and social interactions. Unlike voice dispositions, digital engagement dispositions can represent the in-progress or the final status.

1 Select **Closed** or **Open**.

   - **Closed**: Ends the work for the item. Closed items are removed from the agent's view. In reports, the item is Closed.
   - **Open**: Enables agents to mark items in progress. The items remain open and visible to agents but are not reported.

   Example

   Your agent received an email. The agent replied to the customer and is now waiting for the customer to respond. In this case, the agent would select a disposition such as *Open – Awaiting customer feedback*. When the customer contacts the agent again, the agent closes the interaction with one of the Close dispositions that you created. At that time, reports are updated with the final disposition.

   Important

   Campaigns must always include at least one closed disposition type to complete all interactions and prevent system errors.

2 Select the call disposition type and related options.

- **Redial number**

  You can specify the redial time by selecting **Use redial timer** and entering the time to wait before trying the number again. This option also allows you to enable Allow agents to change reactivation time. The dialer attempts to dial the number as soon as possible, after that time, stopping somewhere in the call list to place the call, and then starting where it left off. You can also specify the maximum number if agents consecutively select this disposition multiple times.

   - **Redial number after duration**: Specify the days, hours, and minutes to redial this number. The dialer redials the number as soon as possible after the specified time.
   - **Number of redial attempts**: If agents consecutively set this disposition multiple times, this is the maximum number of redials the dialer attempts.
   - **Allow agents to change redial time**: In the Five9 Agent application, the disposition displays an additional menu to select a redial time. The time configured in the redial timer setting is also shown to agents as the default option for this disposition. When an agent specifies a redial time,

the phone number is redialed by the campaign at the designated time and the call is delivered to any available agent that is qualified for the campaign.

This feature is useful for outbound customers whose agents work in shifts, such as when agents in the morning shift need to schedule campaign-related callbacks for agents in the evening shift.

Profile and disposition counters apply to individual numbers in a record, not to the entire record. The profile and disposition counters restrict dialing to individual numbers within a record, rather than to the entire record.

When using redial dispositions, consider these points:

- Numbers without a redial timer are considered for dialing by a campaign on next cycle through the list.
- Numbers with a redial timer is dialed again after the time specified.
- The dialer does not dial numbers with redial timers set when going through the list again. It only calls the number at the set time.
- If a number receives the same redial disposition consecutively, the dialer stops attempts when the number of attempts is reached.
- If a redial timer is set, the dialer does not call alternate phone numbers on the contact record until redialing the first number.
- If no redial timer is set, the dialer begins calling the contact record's alternate phone numbers on its first pass of the list.
- If **Allow agents to change redial time** is selected, the redial timer set by agents works in the same way and follows the same rules as the redial timer set by administrators.

Example

Redial without redial timer: the campaign starts at 10:00AM; records are dialed consecutively.

1. At 10:10AM, the campaign dials a number that is assigned to a Redial Number disposition without a redial timer set.

2 By 2:00PM, the campaign has called all records in the list. This cycle of dialing took four hours.

3 By 2:30PM, the campaign reaches the number again that was assigned a disposition with a Redial Number disposition: the campaign attempts to dial the number again four hours 20 minutes after the first attempt.

1 Dial list (first pass)

2 Dial list (second pass)

Example

Redial with redial timer: the campaign starts at 10:00AM; records are dialed consecutively.

1 At 10:10AM, the campaign dials a number that was assigned a disposition as Busy (the Busy system disposition is a Redial Number disposition with the Redial After = 5 minutes and the Number of Attempts = 5).

2 By 10:15AM, the campaign tries the number again (5 minutes after receiving the original Busy disposition). It receives Busy again.

3 Four more attempts are made at 10:20AM, 10:25AM, 10:30AM, and 10:35AM. The number continues to be busy. The dialer stops dialing the number because the maximum number of attempts (5)

was reached with this disposition.

- **Do not dial for campaign**

  When you select this type, the number is not dialed by the campaign, but other numbers from the contact record are dialed unless the **Apply to all numbers in this contact record** option is enabled. If the number exists in other contact records in the list, it can be dialed without restrictions. This type of disposition has two options:

  - **Apply to all numbers in this contact record**: The dialer does not dial any number in the contact record, not just the dispositioned number.

  - **Use timer to reactivate number**: The dialer does not dial the number in the current campaign. Set the days, hours, and minutes to allow the dialer to call the number after that time. It dials the number the next time it passes through the list after the set time. If you select this option, you can also enable the **Allow agents to change reactivation time**: This option is available once the **Use timer to reactivate number** option is selected. Allows agents to set the number reactivation time. The time configured in the **Activate number after duration** setting is also shown to agents as the default option for this disposition. When an agent specifies a reactivation time, the campaign reactivates that number at the designated time and the dialer delivers the call to any available agent qualified for the campaign.

> **Example:** Without an activation timer: A record contains three numbers. The first number is assigned a do not dial disposition. Because every contact record can have up to three numbers to dial, the other two numbers are still dialed. However, if **Apply to All Numbers in This Contact Record** is enabled, no contact record numbers are dialed.

> **Example:** With an activation timer: A called party asks not to be called again for at least two hours. The dialer skips the number on the next pass in one and 1/2 hours as it is before the timer setting. The dialer calls the number in its next pass three hours after the set timer.
>
> If the dialer is in vertical dialing mode, it does not wait until the three-hour mark to call the number. It calls the number when the timer expires.

- **Final disposition for contact record**

  When you select this type of disposition, the contact record, including alternate phone numbers, is not dialed again by the campaign. A final decision has been made, such as *Application taken* or *Not interested*. This type of disposition has one option:

  - **Apply final disposition to all contact records in the campaign lists that use this disposition.** When you select this option, the contact record is not dialed in any campaign that contains this disposition. A final disposition can be applied to multiple campaigns when the other campaigns are using this same disposition.

  > **Note**
  >
  > If a contact record was in a campaign with this option enabled in a final disposition, its numbers may still be called if it is assigned to a new campaign.

- **Add number to DNC list**

  When using the **Add Number to DNC List** option, the customer's individual number or entire contact record is placed in the local Do Not Call list for the domain. Choosing this option enables the disposition options described in the example below.

You can assign this option to one number in a contact record, for example, if a customer only wants one number placed on the DNC list, but is available at the other numbers.

Example

A called party asked for one or all phone numbers to not be called again. There are the following options:

- **Add the dialed number**: Adds only the current number (the number dialed) to the DNC list.
- **Add the dialed number and finalize the contact record for this campaign**: Adds the current number and makes the record final for the campaign. This option stops dialing this record for this campaign but does not add the contact's other phone numbers to the DNC list. The alternate numbers in the contact record are still available for other campaigns.
- **Add all numbers and finalize the contact record for this campaign**: Adds all phone numbers for the contact record to the DNC list. The alternate numbers are not available for any campaign.

3 Click **Next** to configure answering machine settings.

Answering Machine

You set custom dispositions and the system Answering Machine disposition on the Answering Machine tab. Agents can set the Answering Machine disposition as soon as they connect to an answering machine and are ready for other tasks.

1 Click the drop-down list for **Action on disposition selection** and select an option. The options are:

- **Do not leave message**: No further action.
- **Play prompt**: Switches the call to a message prompt line to allow the agent to disconnect from the call. The message plays after detecting two seconds of silence or when set by the **Max answering machine greeting time (sec)** option. You can only configure one message prompt per

disposition. The prompt is played either after a two second silence is detected (for example, after the tone, please leave a message... beep) or after the configured **Max answering machine greeting time (sec)**. One prompt can be configured per disposition. You must select the prompt from the drop-down list.

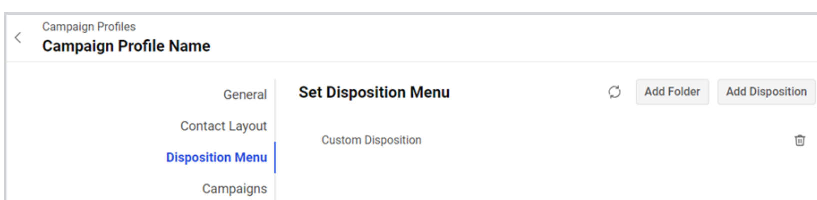
- **Play IVR script (advanced)**: Agents who are connected to an answering machine or voicemail box can disconnect from a call but leave a message playing for an answering machine. The IVR script plays after a two-second silence is detected (for example, after the tone, please leave a message... beep) or after the configured **Max answering machine greeting time (sec)**. You must select an IVR script from the drop-down list.

The default **Max answering machine greeting time (sec)** is 5. If an outbound campaign that uses these answering machine prompt/IVR dispositions dials many cell phone numbers, Five9 recommends setting a longer greeting time, such as 40 seconds, due to the often longer voicemail greeting messages.

You can use branching logic or dynamic Text-to-Speech when leaving a message. For example, to configure an IVR script that plays a personalized message from the agent assigned to the call, you can configure a Case module, with the Agent.user_name variable and connect the branches to one Play module for each agent. Another example would be to leave a message with dynamic Text-to-Speech, which can play information such as an account balance to a client.

2 Click **Done** to save the new disposition.

3 Assign the disposition to a campaign profile. Go to **Campaign Profile** > **Disposition Menu**, and add the disposition:



4 Click **Done**.

Configuring Dispositions in SCC

Note

This topic applies if your domain existed before R12 and you have not enabled unified dispositions.

Early releases support configuring dispositions in both SCC and VCC. Release 13 and later support configuring dispositions in VCC or Admin Console. Refer to Adding Custom Definitions in VCC in Basic Configuration for steps in creating a new custom disposition in VCC. New domains should have unified dispositions only. For information on configuring dispositions in Admin console, see **Configuring Dispositions in Admin Console**.

Digital engagement channel dispositions apply to email, chat, and social interactions. Unlike voice dispositions, digital engagement dispositions can represent the in-progress or the final status:

- Open: Enables agents to mark items in progress. The items remain open and visible to agents but are not reported.
- Close: Ends the work for the item. Closed items are removed from the agent's view. In reports, the item is Closed.
- Transfer: Enables agents to mark items in progress. The items remain open and visible to agents but are not reported.

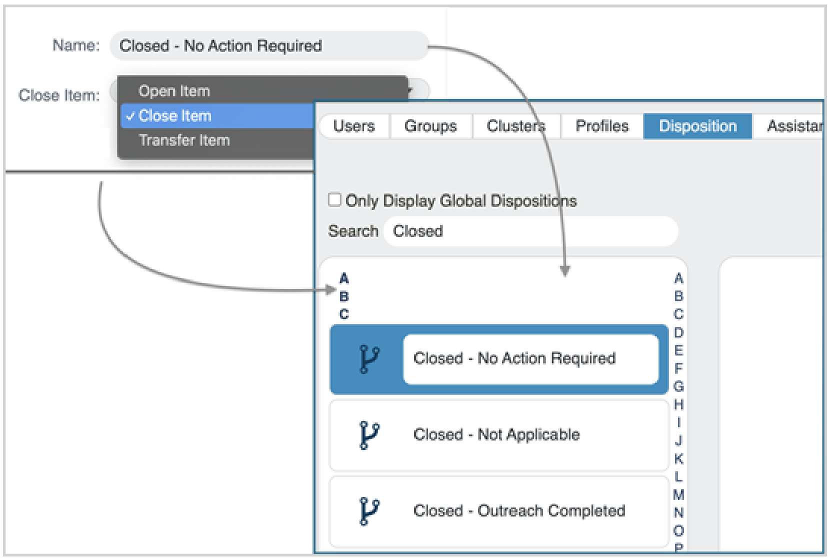
Example

Your agent received an email. The agent replied to the customer and is now waiting for the customer to respond. In this case, the agent would select a disposition such as *Open – Awaiting customer feedback*. When the customer contacts the agent again, the agent closes the interaction with one of the Close dispositions that you created. At that time, reports are updated with the final disposition.

Important

Campaigns must always include at least one closed disposition type to complete all interactions and prevent system errors. For more information on types of dispositions, see Disposition Types in Basic Configuration.

Related digital engagement interactions are not linked. Therefore when customers reply to an email, this email becomes a new email interaction instead of being linked to the original interaction. The agent sets a disposition for both related interactions with a Close disposition. Reports show the closed dispositions.

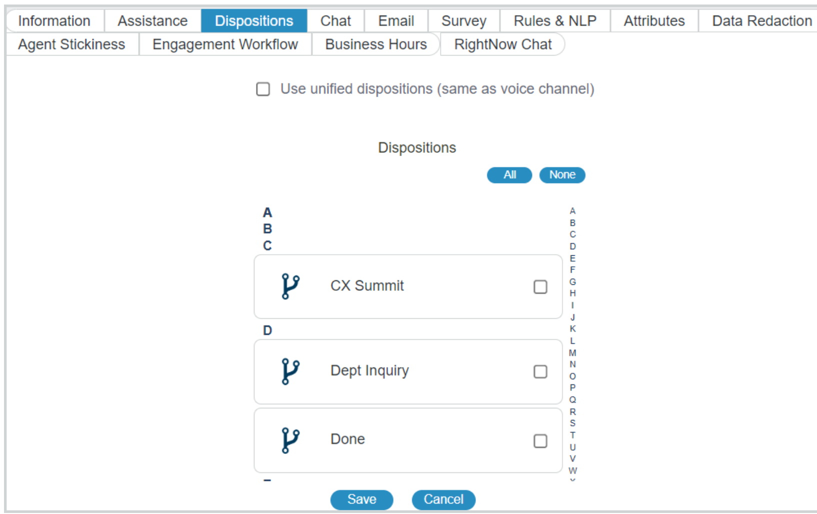


You may define multiple dispositions in each category. Agents see only the name of the disposition. Therefore, be sure to enter a descriptive name. When done, select the type of disposition. Your dispositions are listed alphabetically in the navigation pane.

1. Go to **Disposition** and click **Add**.
2. Assign a unique name and select a category.
3. Select **Global Disposition** to make the disposition available to all SCC profiles by default.
4. Click **Save**.

Optionally, you can configure dispositions as unified on a profile. **If you enable unified dispositions on a profile, you cannot revert the option.**

1. To use the same dispositions for voice and digital engagement interactions for a specific profile, enable **Use Unified Dispositions**.



Important

You can also assign unified dispositions to a domain, but you cannot revert that option once you enable it. See **Enabling Global Settings**.

2 Click **Save**.

3 Select the checkbox of the SCC disposition to add to the profile.

Defining Assistance Responses

Assistances are predefined responses that agents can use during chat, email, or social posts to respond to the customer's question by sending a predefined answer. These predefined responses for assistance are designed to answer typical questions or to provide directions for a common situation.

Note

Assistance responses do not pass inline images for all email providers.

Creating Simple Assistances

Simple assistances are common responses to routine interactions designed to save the agent time and effort while increasing consistency. For example, an assistance might provide instructions to reset a password or send a link to instructions.

1 Click **Add**.

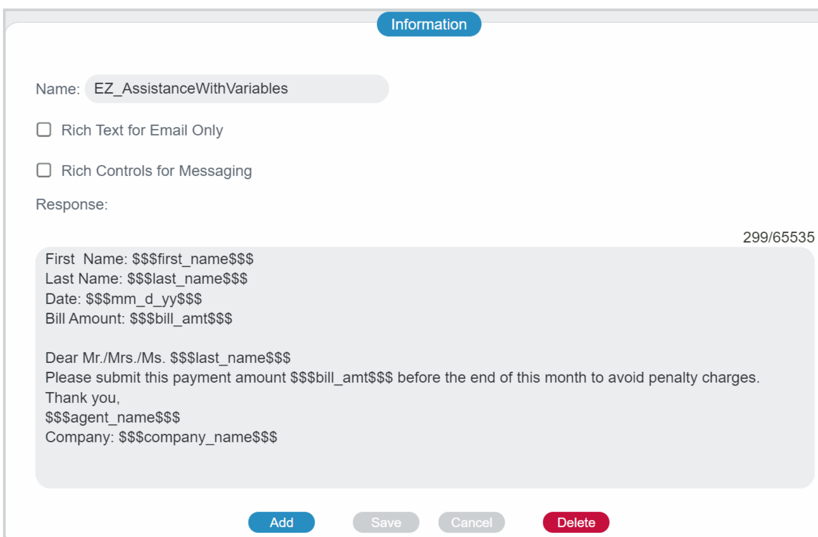
2 Optionally, enable the rich text for email or rich controls for messaging options to display the available text-formatting options.

   Although the option specifies email only, the feature can be used with chat and social if it is set in the profile.

3 Enter the name and the text of the assistance, including links to text or images in a URL.

   You can not paste an image in the assistance.

   > **Note**
   > The numbers above and to the right of the formatting toolbar indicate the number of characters used so far and the maximum number of available characters (65535).



4 Click **Save**.

Creating Dynamic Assistances

You can also create dynamic assistances by using your existing variables in this balanced format: **$$$company.name$$$**. You can set variables in the body of the assistance form. Agents can specify the HTML variable values to populate the body of the email or interaction when the assistance is updated. Predefined assistances are listed in alphabetical order.

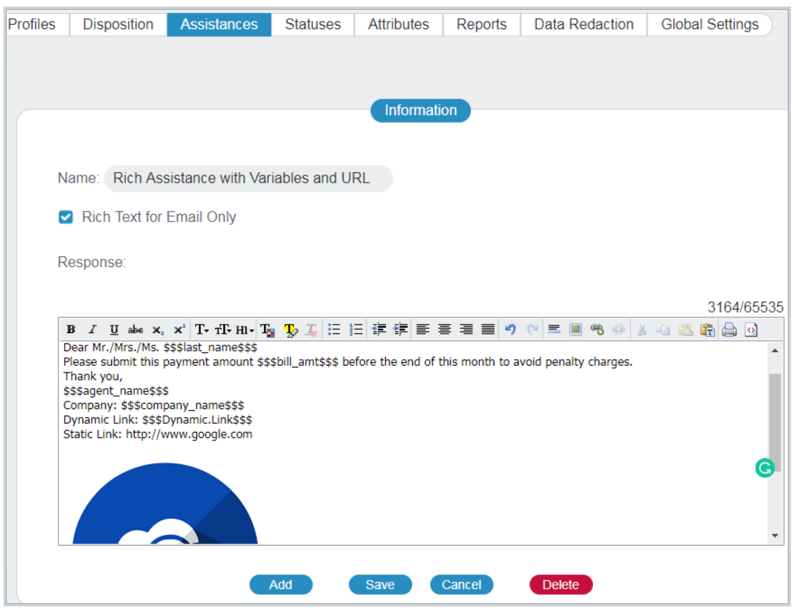
Be sure that your variables follow these rules:

- Use only these characters: `a-z`, `A-Z`, `0-9`, and special characters `-:_.`.
- Do not use spaces.

Very long strings display ellipses in the form label.

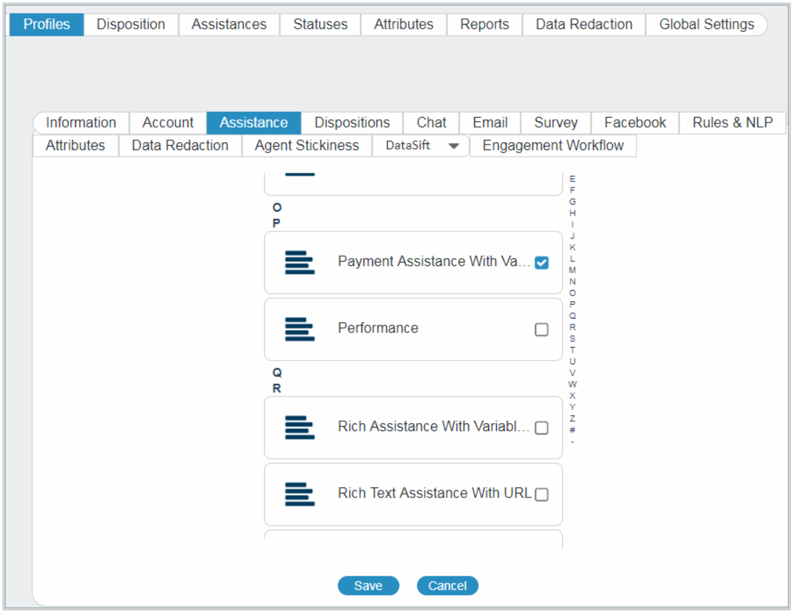
Note

The numbers above and to the right of the formatting toolbar indicate the number of characters used so far and the maximum number of available characters (65535).



Associating an Assistance with a Profile

To associate an assistance with a profile, select a profile from the list, enable the assistance, and click **Save**.

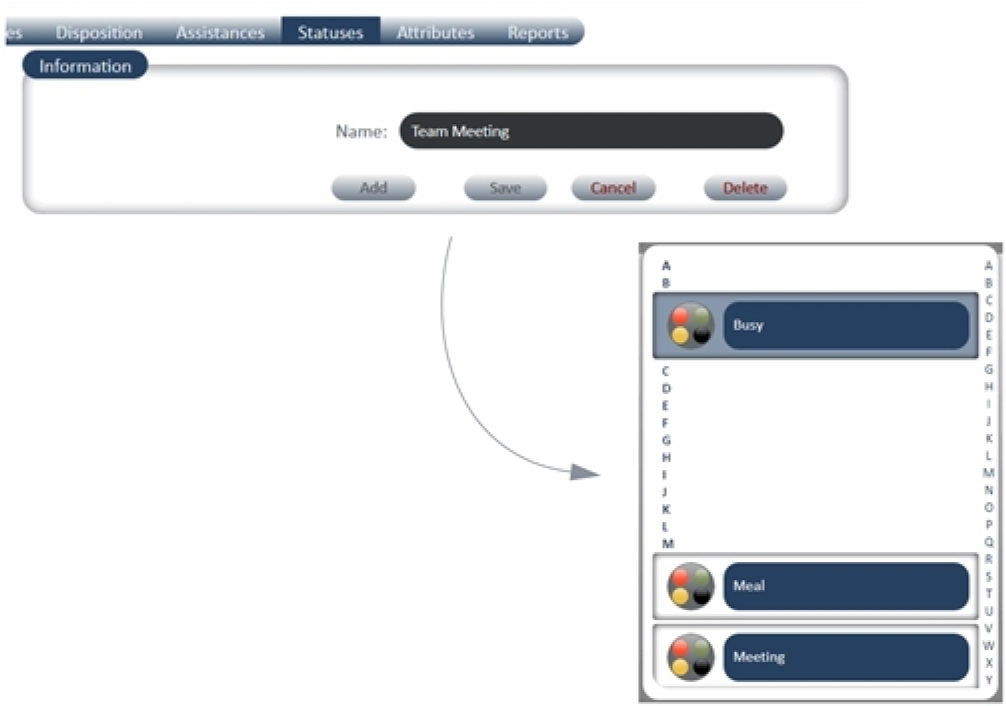


Creating Statuses

In the Statuses tab, define the ready states that your agents need to indicate their work state. To add a status, follow these steps:

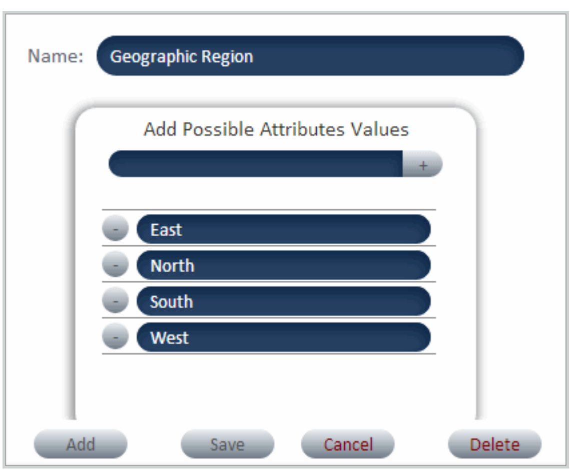
1. Click **Add.**
2. Enter a unique name, and click **Save**.

The new status appears in your list of statuses. For example, **On Social** can be used by agents working on a social interaction. Be as specific or general as needed for your business.



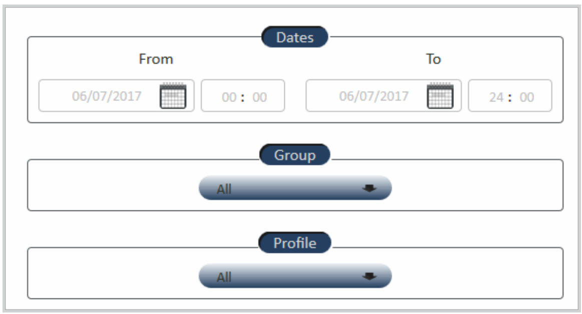
Defining Attributes for Agents to Tag Text Items

Agents can tag interactions with predefined attributes to help to filter interactions for reporting. Agents can assign multiple attributes to a single interaction. In the Attributes tab, name and enter values in the **Add Possible Attribute Values** field. Click the plus sign (+). This example contains four selections that agents can use to indicate a general geographic region that the contact represents.



Reporting Metrics about Digital Engagement Media Activity

Use the **Reports** tab to run the same reports that are available from the Five9 Dashboards and Reports Application. You create digital engagement reports by applying filters to the data. The filters differ based on the characteristics of the data.



This table describes the possible filters:

Dates	Social reports. Depending on the data, specify a start and end date for a date range, or a time span for reporting.
Time Interval	Some reports. Specify intervals from 15 minutes to one month.
Menu Selector	Some reports. Select a specific profile, clusters, skills, or other criteria.
Attribute Selector	Some reports. Add attributes, such as geographic region or type of post.

Five9 Engagement Workflow

Five9 Engagement Workflow enables you to provide more guidance and detail to your digital engagement channel routing solutions. Much of Five9 Engagement Workflow resides within IVR functionality. For additional information on routing solutions and Engagement Workflow IVR script templates, refer to the Interactive Voice Response (IVR) Administrator's Guide.

By default, such things as sending customer email replies to the agent profile associated with the skill in the original interaction, are automatic and require no additional configuration.

You can further augment your Engagement Workflow using a customized Drools file for use with your Five9RulesEngine IVR module. This rules and Drools creation and use is described here and installed into your Digital Engagement Administrator console.

Configuring Your Five9 Rules
Configuring Your VCC to Route Salesforce Objects
Example IVR Scripts for Engagement Workflow

Configuring Your Five9 Rules

Your Five9 Rules Engine definition file is a Drools file (.drl), which is written in Java. It enables you to apply logic to the data found in your email interactions.

> **Important**
> To configure a Drools file, you must have a working knowledge of Java.

Five9 Rules Engine Objects
Assembling Your Drools File
Building Your Drools File

Five9 Rules Engine Objects

In the Five9 Rules Engine, the Drools file references two objects: WorkItem and Dynamic Attributes.

Work Item

The WorkItem attribute contains the interaction ID of the email interaction. When the interaction ID is passed to the Five9 Rules Engine, the WorkItem object makes all parts of the email available for manipulation. If the interaction ID is not passed, data manipulation is limited to the content of DynamicAttributes.

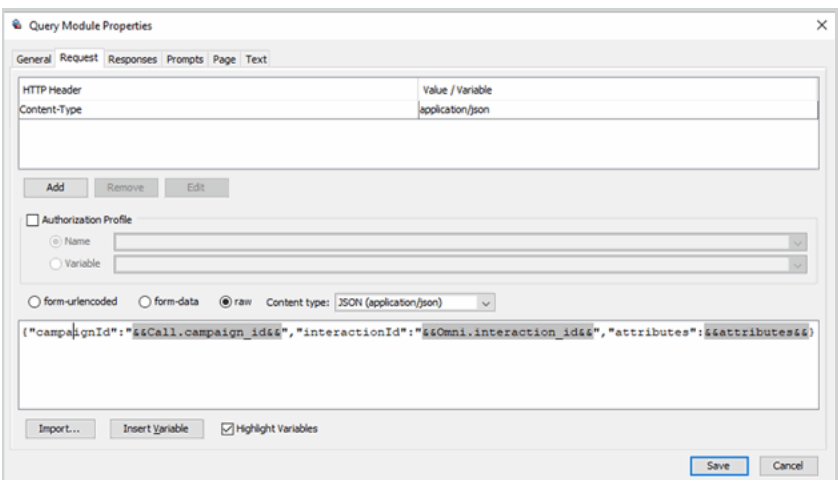
Dynamic Attributes

DynamicAttributes objects are key-value (KV) pairs, both string values, that serve as input and output for the Five9 Rules Engine. These attributes are unique to your domain. The Five9 Rules Engine accesses, modifies, then returns your KV list to the IVR with enhanced routing options or recommended actions for the agent.

To pass attributes to your Five9 rules engine, follow these steps:

1 Request the parameters and attributes.

You can create dynamic attributes to be passed to the Five9 rules engine by using an IVR Query module. In the example below you send a raw JSON request to dynamically extract attributes specific to campaign and interaction.



Query JSON request:

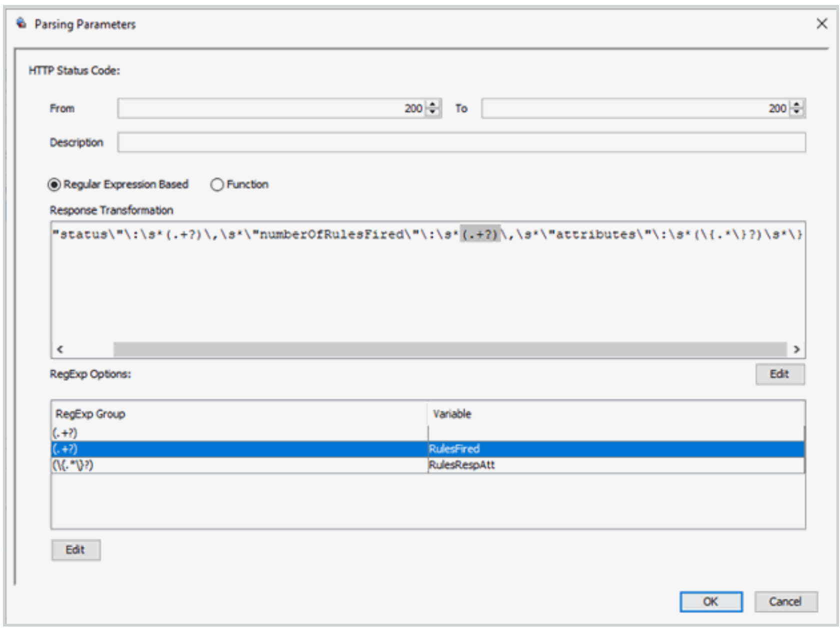
```
{"CampaignID": "&&Call.campaign.id&&","interaction.id":
"&&Omni.interaction_id&&","attributes: "&&attributes&&"}
```

The value of attributes is also a simple JSON request, such as:

```
{"body": "","number1": "555-123-4567","cookie monster": "Cookies
Yum!"}
```

2 Capture the query response.

You can configure the Query module response tab to create a JSON response object, such as this regular expression (RegEx) example:



For this response:

```
{"status": 1, "numberOfRulesFired": 1,"attributes": {"body":
"","number1": "555-123-4567", "cookieMonster": "Cookies Yum!:}}
```

The RegEx detail is:

```
\{\s*\"status\"\:\s(.+?)\,\s*\"numberOfRulesFired\"\:\s*
(.+?)\,\s*\"attributes\"\:\s*(\{[\s\w\d-":,!]*\}?)\s*\}
```

In this example, you are creating three capture groups for the following objects:

- `status`
- `numberOrRulesFired`
- `attributes`

The `status` and `numberOfRulesFired` objects are useful for error handling.

For more information about configuring the IVR Query Module, see the Interactive Voice Response (IVR) Administrator's Guide.

Error Handling

This sample JSON response shows that a rule failed:

```
{"status": 0, "numberOfRulesFired": -1,"attributes": {"body":
"","number1": "555-123-4567", "cookieMonster": "Cookies Yum!:}}
```

Notice `status = 0`and `numberOfRulesFired = -1`.

Use these conditions to implement fallback routing options if your rules engine fails.

Assembling Your Drools File

The following methods are available for building your Drools file to access and manipulate data. An example key-value pair used in the sample Drools file below is Customer Value (key), with possible values being gold, silver, or platinum. You can configure you IVR Query Module to pass dynamic attributes, as shown below:

Workitem Write Methods

Workitem write methods use attribute names and values defined by the Digital Engagement Administrator, such as Customer Value.

```
public void addNextBestAction(String actionName,String description)
public void tagItem(String tagName, String priority)
public void setAttribute(String attributeName, String
atttributeValueName, boolean overwrite)
```

Workitem Read Method

This method retrieves the email body, up to 20k characters.

```
public String getBody()
```

DynamicAttributes Write Methods

```
public void set(String keyName, String|Integer|Boolean|Long|Double
keyValue)
```

Example

```
when
    attributes : DynamicAttributes (true)
then
    attributes.set("discount","30") // String, String
    attributes.set("age",30) // String, Int
    attributes.set("HighValue",false) // String, Boolean
    attributes.set("price",1L) // String, Long
    attributes.set("rate",2.3) // String, Double
end
```

DynamicAttributes Read Methods

```
public String getString(String keyName)
public Integer getInt(String keyName)
public Boolean getBoolean(String keyName)
public Long getLong(String keyName)
public Double getDouble(String keyName)
```

Example

```
when
    attributes : DynamicAttributes (true)
then
    attributes.get("discount","30") // String, String
    attributes.get("age",30) // String, Int
    attributes.get("HighValue",false) // String, Boolean
    attributes.get("price",1L) // String, Long
    attributes.get("rate",2.3) // String, Double
end
```

Building Your Drools File

In this example, the first rule is evaluated to determine customer value. The Five9 Rules Engine recommends that the agent calls the customer if that customer’s value is gold or platinum, a call provide better customer service than an email response.

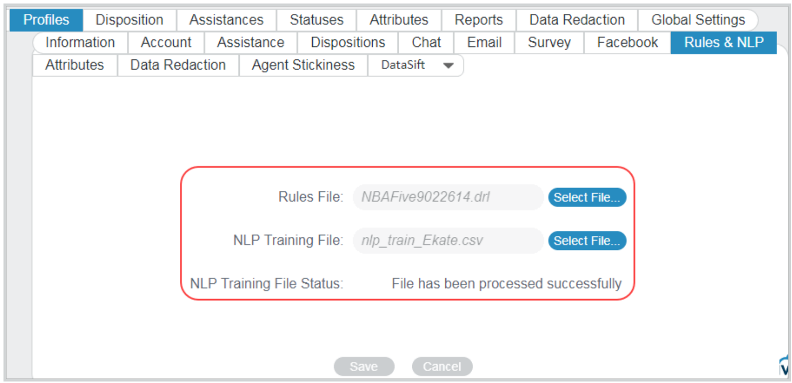
```
// Your Drools file may contain multiple rules, as shown here.

import com.five9.ruleengine.model.DynamicAttributes;
import com.five9.ruleengine.model.Workitem;
```

```
rule "If gold and platinum customer, set next best action to call
customer."

when
   attributes : DynamicAttributes (
      getString("Customer Value").toLowerCase().contains("gold") ||
      getString("Customer Value").toLowerCase().contains("platinum")
      )
   workitem : Workitem ( true )

then
   workitem.addNextBestAction(
      "First Action", "Call customer at this number: " +
      attributes.getString("Phone Number") +"!");
   workitem.setAttribute(
       "Customer Value", attributes.getString("Customer Value"), true);
   workitem.tagItem("Call Customer", "1");
end
```

The second rule recommends offering a 10% discount when that customer’s value is platinum.

```
rule "If platinum customer, set next best action to offer a 10%
discount."

when
   attributes : DynamicAttributes(
      getString("Customer Value").toLowerCase().contains("platinum") )
   workitem : Workitem ( true )

then
   workitem.addNextBestAction(
      "Second Action", "Offer a 10% discount on the account balance.");
   workitem.tagItem("Offer Refund", "2");

end
```

Once complete, you must load both your <Rules>.drl file and your <NLP Training>.csv file using the Digital Engagement Administrator application, **Rules & NLP** tab.



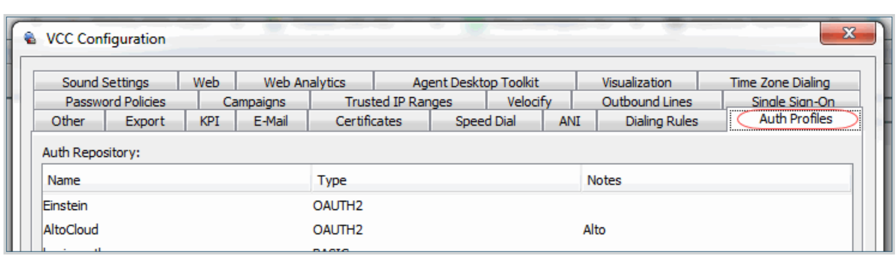
For more information about using the Five9 Rules Engine, see the Interactive Voice Response (IVR) Administrator's Guide.

Configuring Your VCC to Route Salesforce Objects

This section applies to Five9 domains enabled for external routing. To verify your domain configuration, contact your Five9 representative. The Plus Adapter for Salesforce Administrator's Guide and Interactive Voice Response (IVR) Administrator's Guide provide detailed configuration instructions to enable the routing of Salesforce chat and case objects.

Configuring Authentication

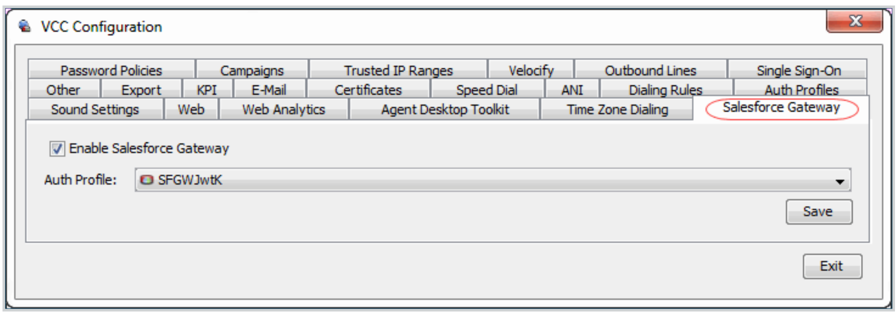
Enable your authorization profile to access the Salesforce API.



For more information on configuring authorization profiles, see the Global Settings chapter in the Basic Configuration Administrator's Guide.

Enabling Salesforce

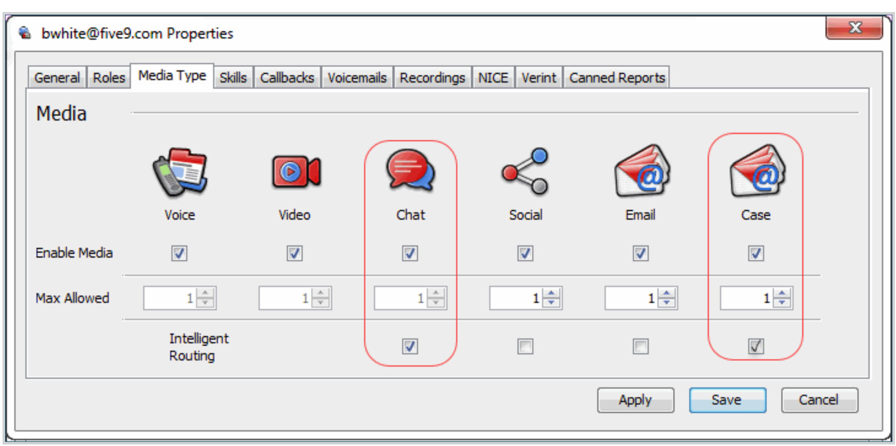
Enable Salesforce in the Salesforce gateway tab.



For more information on enabling the Salesforce gateway, see the Global Settings chapter in the Basic Configuration Administrator's Guide.

Enabling Chat and Case Media Types

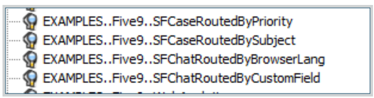
Select Chat and Case as media types for agents that will be receiving Salesforce interactions.



For more information on enabling media types, see the User Accounts chapter in the Basic Configuration Administrator's Guide.

Creating IVR Routing Scripts

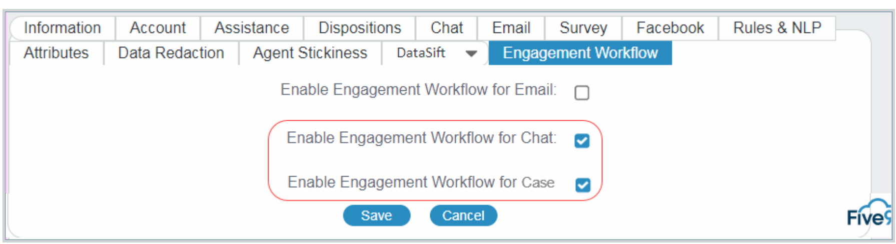
Create IVR scripts to route your Salesforce objects. Five9 has created example IVR scripts to simplify your scripting efforts.



For more information, see **Example IVR Scripts for Engagement Workflow**.

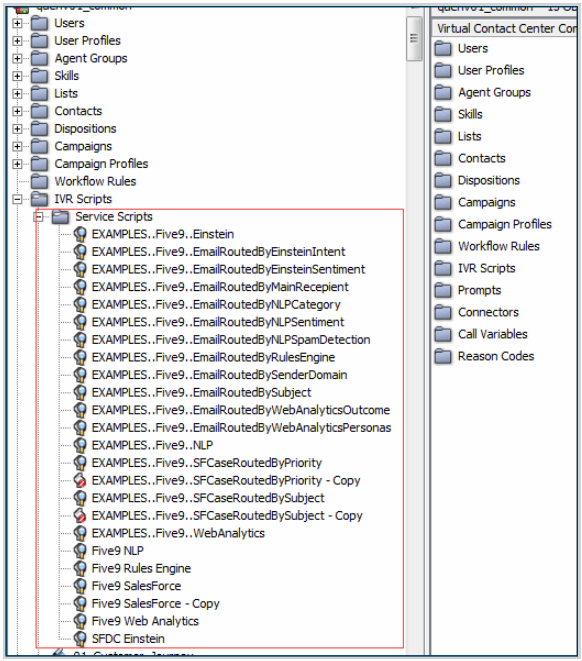
Enabling Engagement Workflow or Intelligent Routing

To route Salesforce objects by using Five9 IVR scripts, enable Five9 Engagement Workflow in the Digital Engagement Administrator application, **Engagement Workflow** tab.



Example IVR Scripts for Engagement Workflow

To see a working examples before you create your own script, you can open any of the example files listed under the **IVR > Service Scripts** subfolder. Example IVR scripts are to be used for text (chat and email) interactions only.



The service scripts available and their function are listed below.

> **Note**
> The values listed as **Input Parameters** can be specified in **Campaign Properties > Schedule > IVR Script Parameters**.

Examples..Five9..Einstein: Calls the SFDC Einstein system script. Input parameters:

- **auth-profile**: Authorization profile for access to the Einstein engine model.
- **modelID**: Used to determining customer's purpose (configured in Einstein).
- **sample_location**: URL of an image to be classified by SFDC Einstein engine.
- **document1**: Test string sent to Einstein for intent evaluation.
- **document2**: Test string sent to Einstein for the sentiment evaluation.

Examples..Five9..EmailRoutedByEinsteinIntent: Routes an email based on the purpose, as produced by Einstein engine variables. Input Parameters:

- **positive_skill**: Name of a queue used for routing email interactions with positive sentiment.
- **negative_skill**: Name of a queue used for routing email interactions with negative sentiment.
- **general_skill**: Name of a queue used for routing email interactions with neutral or undefined sentiment.

auth-profile: Name of the authorization profile that is configured for contacting the Einstein engine.

Examples..Five9..EmailRoutedByEinsteinSentiment: Routes an email based on sentiment produced by Einstein engine variables. Input Parameters:

positive_skill: Name of a queue used for routing email interactions with positive sentiment.

negative_skill: Name of a queue used for routing email interactions with negative sentiment.

general_skill: Name of a queue used for routing email interactions with neutral or undefined sentiment.

auth-profile: Name of the authorization profile that is configured for contacting the Einstein engine.

Examples..Five9..EmailRoutedByMainRecipient: Routes an email based on the **To**: field. Input parameters:

sales_email: Email address of the Sales queue.

sales_skill: Name of the queue to which sales agents belong.

support_email: Email address of the support queue.

support_skill: Name of a queue to which support agents belong.

general_skill: Default queue used if no matches were found.

Examples..Five9..EmailRoutedByNLPCategory: Routes an email based on Five9 NLP categorization. Input parameters:

category: Name of the NLP category. This value may be omitted for the main category.

Skill2CategoryMapping: Key-value list {“`valueX”:”skillX,`...”}, where `valueX` are the possible values of the category and `skillX` are the names of corresponding queues for routing.

general_skill: Name of queue for uncategorized emails.

Examples..Five9..EmailRoutedByNLPSentiment: Routes an email based on Five9 NLP sentiment. Input parameters:

positive_skill: Name of a queue used for routing email interactions with positive sentiment.

negative_skill: Name of a queue used for routing email interactions with negative sentiment.

general_skill: Name of a queue used for routing email interactions with neutral or undefined sentiment.

Examples..Five9..EmailRoutedByNLPSpamDetection: Filters out spam based on Five9 NLP categorization. Input parameters:

general_skill: Name of the queue that will receive non-spam emails.

Examples..Five9..EmailRoutedByRulesEngine: Routes an email using the Five9 Rules Engine module. Input parameters:

billing_skill: Name of the queue that will receive billing email interactions.

sales_skill: Name of the queue that will receive sales email interactions.

support_skill: Name of the queue that will receive support email interactions.

general_skill: Name of queue for uncategorized emails.

Examples..Five9..EmailRoutedBySenderDomain: Routes an email based on the **To**: field. In this example, email addressed to **acme.com** are routed to the queue assigned to handle acme's email interactions. Emails addressed to **pizza.com** are routed to the queue assigned to handle pizza's email interactions. Input parameters:

pizza_skill: Name of queue assigned to handle pizza.com email interactions.

acme_skill: Name of queue assigned to handle acme.com email interactions.

general_skill: Default skill used if no matches were found.

Examples..Five9..EmailRoutedBySubject: Routes an email based on the subject field. For the example script, the script is searching the email subject for the keywords *problem* or *buy* and route the email to support or sales accordingly. Input parameters:

sales_skill: Name of the queue that will receive sales email interactions.

support_skill: Name of the queue that will receive support email interactions.

general_skill: Name of queue for uncategorized emails.

Examples..Five9..NLP: Routes of the Five9 Natural Language Processing (NLP) engine in real time mode. Input parameters:

question: A question to be analyzed by the NLP engine.

Examples..Five9..SFCaseRoutedByPriority: Routes SalesForce cases based on the priority field of the case. For this example, the script is searching for the words "problem" or "buy" and routes interactions to support or sales correspondingly. Input parameters:

AuthProfile: Name of the authorization profile that is configured for SalesForce access.

SF_URL: Salesforce URL for access.

Goldskill: Name of the queue that will receive high-priority interactions.

Silverskill: Name of the queue that will receive medium-priority interactions.

general_skill: Name of queue for default interactions.

Examples..Five9..SFCaseRoutedBySubject: Routes SalesForce cases based on the subject field of the case. For this example, the script is searching for the words “problem” or “buy” and routes interactions to support or sales correspondingly. Input parameters:

- **AuthProfile**: Name of the authorization profile that is configured for SalesForce access.
- **SF_URL**: Salesforce URL for access.
- **sales_skill**: Name of the queue that will receive sales interactions.
- **support_skill**: Name of the queue that will receive support interactions.
- **general_skill**: Name of queue for interactions if no matches were found.
- **SalesPattern**: RegEx for sales-related cases.
- **SupportPattern**: RegEx for support-related cases.

Examples..Five9..SFCaseRoutedByBrowserLang: Routes SalesForce cases based on the client browser’s language setting. For this example, the pre-defined languages are: English, Spanish, and Russian. Input parameters:

- **AuthProfile**: Name of the authorization profile that is configured for SalesForce access.
- **EnglishSkill**: Name of the queue that will receive English language interactions.
- **SpanishSkill**: Name of the queue that will receive Spanish language interactions.
- **RussianSkill**: Name of the queue that will receive Russian language interactions.
- **SF_URL**: Salesforce URL for access.

Examples..Five9..SFCaseRoutedByCustomField: Routes SalesForce cases based on a field specified in the Salesforce LiveChatTranscript object. Input parameters:

- **Auth-profile**: Name of the authorization profile that is configured for SalesForce access.
- **FieldName**: Name of the field in the LiveChatTranscript object.
- **FieldValToSkillMap**: Mapping to identify and distribute field values to skills.
- **DefaultSkill**: Name of queue for interactions if no matches were found.

Configuring Five9 Video Engagement

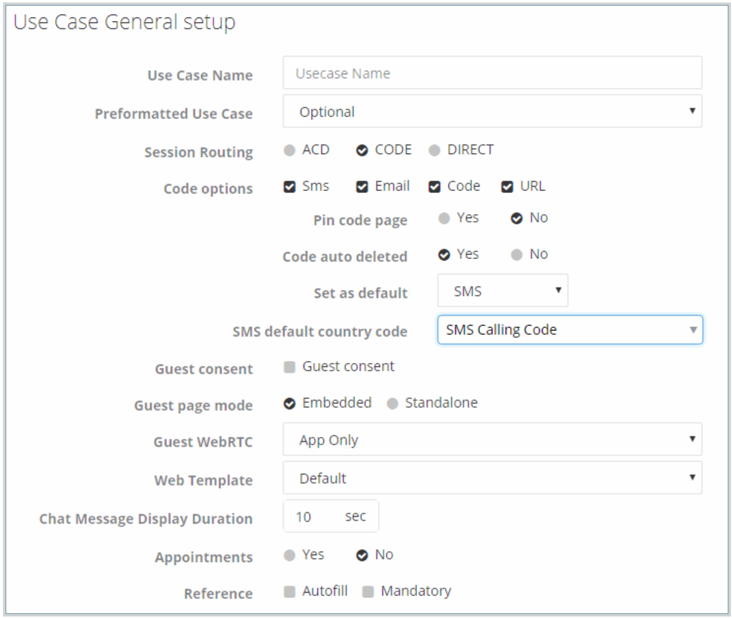
Five9 Video Engagement enables visual support collaboration with your customers. This chapter describes the user properties and workstation configuration necessary to support Five9 Video Engagement.

Creating Use Cases

Five9 agents are granted access to video engagement interaction types based on each use case that you define. The use cases and users are independent and may be created in any order.

Creating Uses Cases

1. Log into SightCall Administration Portal.
2. Select **Use cases** from the Console menu.
3. Click **+Add Use Case** button.
4. Select the following general setup options:



- **Use Case Name** (manually type to enter):
  - Voice only
  - Video only
  - Voice and Video

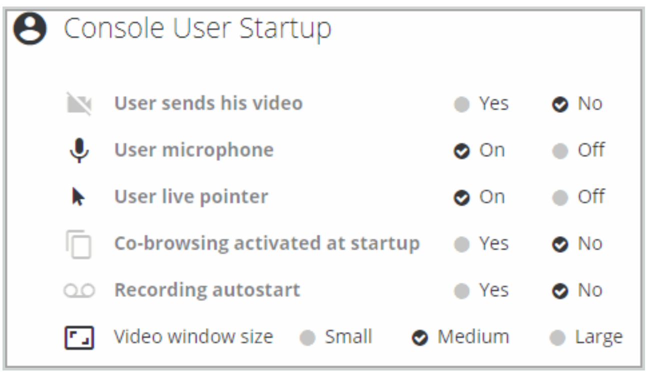
    Naming must match exactly: *case sensitive, space sensitive*
- **Session Routing**: The default setting, CODE, must remain selected.
- **Code Options**. Select one or more of the following options:
  - SMS: Use SMS to send video link.
  - Email: Use Email to send video link.
  - Code: Generates a 6-digit code the customer can use to begin the video session.
  - URL: Provides the agent with URL required to start video session. Copy and paste to customer via any communication channel.
- **PIN Code Page**: No
- **Code auto deleted**: Yes
- **Set as Default**: SMS

  - **SMS Default Country Code**
  - **Guest page mode**: Standalone **Standalone** is required for video display.
  - Remaining fields: Accept defaults.

5 Click **Continue**.

Configuring Console Options

Console user setup defines the options for your agent when a Five9 Video Engagement session starts. The graphic below represents common configuration.

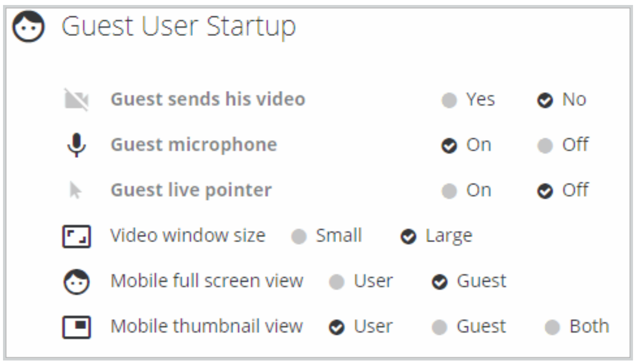


Feature	Description
User sends video	Yes: Agent station video camera begins sending video when session begins. No: Session begins and agent must enable video manually.
User microphone	On: Agent audio is enabled. Off: Agent audio is enabled.
User live pointer	On: Agent can use live pointer on video. Off: Agent cannot use live pointer on video.
Co-browsing activated at startup	Yes: Allows application sharing (not desktop sharing). No: Application sharing is disabled.
Recording autostart	Yes: Recording begins automatically. No: Recording does not begin automatically.
Video window size	Small, Medium, or Large; size varies by display hardware.

Configuring Guest User Startup Options

Guest user startup options define the interaction experience for your customer or contact.

1 Define the contact experience settings shown below.



- **Guest sends his video**
  - Yes: Contact video begins when session begins.
  - No: Contact must initiate video.
- **Guest microphone**
  - On: Contact has audio through SightCall.
  - Off: Contact does not have audio through SightCall.
- **Guest live pointer**
  - On: Contact can use live pointer on video.
  - Off: Contact cannot use live pointer on video.
- **Video window size**
  - Small: Small video window display for guest.
  - Large: Large video window display for guest.
- **Mobile full screen view**

- User: Not used for desktop agents.
- Guest: Guest video occupies full screen.

- **Mobile thumbnail view**
  - Thumbnail view provided for User, Guest, or Both.

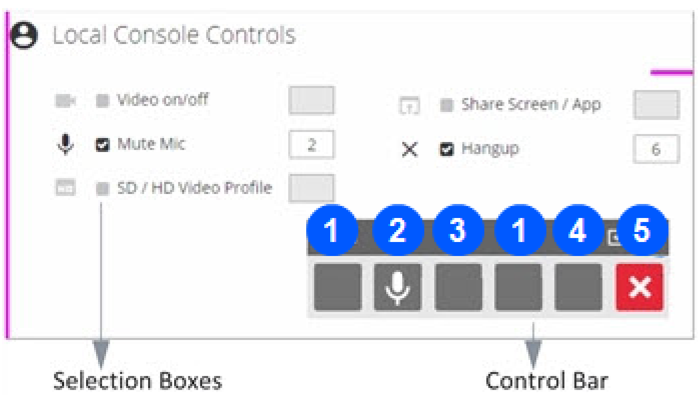
2 Click **Continue.**

Configure Console Controls

The agent is the local console user. The contact is the remote console user.

1 In the **Local Console Controls** section, click the selection box beside the desired feature.

> **Note**
> The features appear on the control bar in the order they are selected.



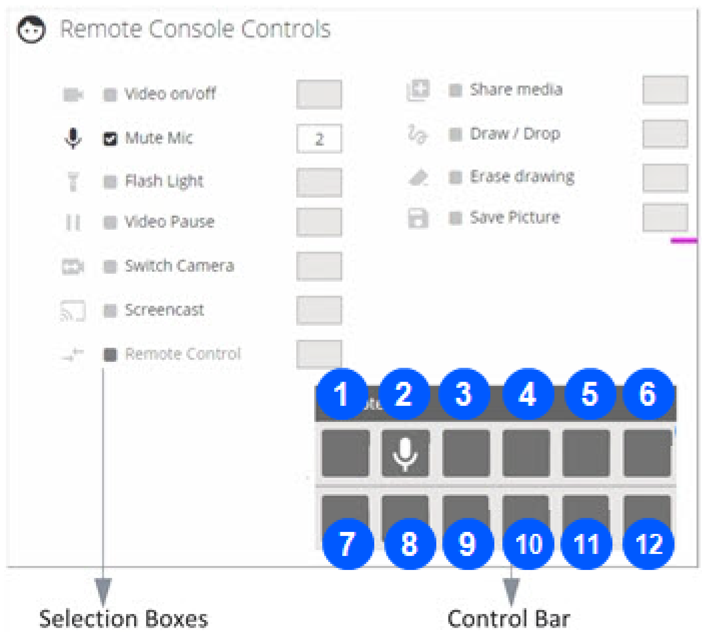
1 **Video On/Off**: Toggles video camera on or off.
2 **Mute Mic**: Toggles agent microphone mute.
3 **SD/HD Video Profile**: Toggles SD or HD video profile.
4 **Share Screen/App**: Shares the agent view with the contact.
5 **Hangup**: Disconnects video engagement session.

To configure controls, click the selection box beside the feature in the **Remote Console Controls** section.

Note

The features appear on the control bar in the order they are selected.

The Remote Control section determines the controls for the contacts device available to the agent.



1 **Video On/Off**: Toggles contact device video display on or off. This send a request to the contact that must be accepted.
2 **Mute Mic**: Toggles microphone mute on contact's device.
3 **Flash Light**: Toggles light on contact's device.
4 **Video Pause**: Pauses video on contact device.
5 **Switch Camera**: Toggles video between screen-facing to rear-facing cameras, if applicable.
6 **Screencast**: Transmits the video to a screencast-enabled device.
7 **Remote Control**: Gives agent remote control of contact's device.
8 **Share Media**: Adds additional users to video stream.
9 **Draw/Drop**: Enables drawing on displayed video.
10 **Erase Drawing**: Removes drawing from displayed video.
11 **Save Picture**: Captures and saves video image.

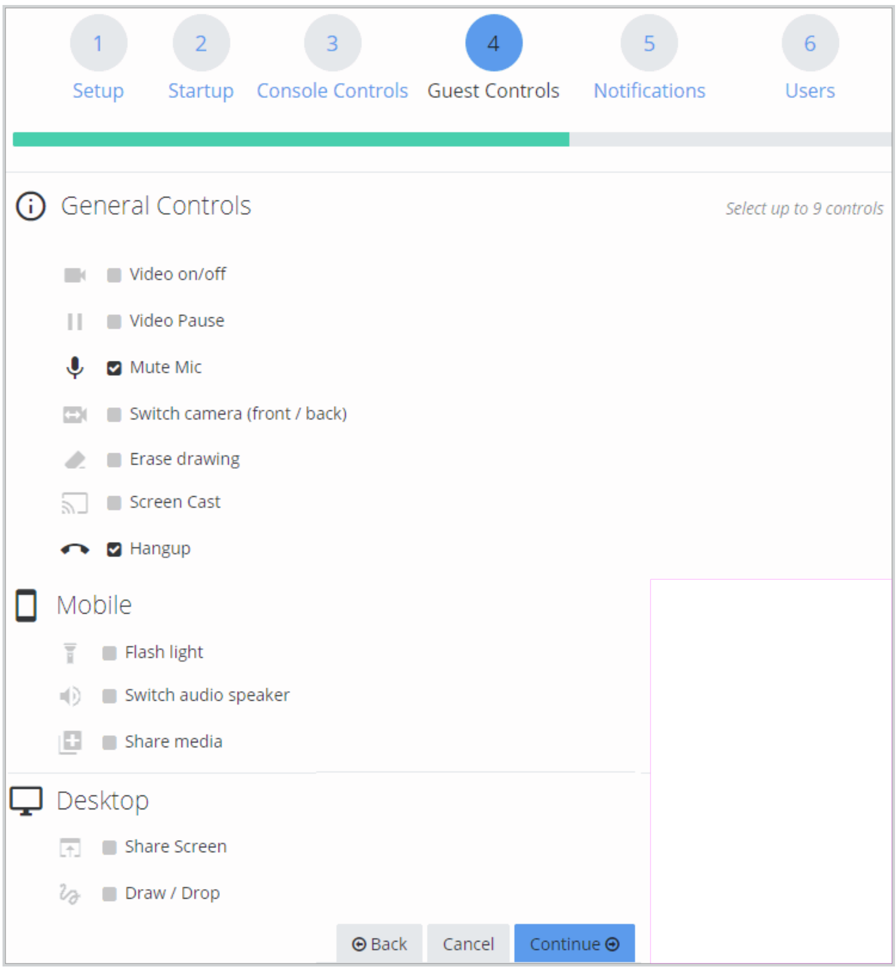
Note

Five9 recommends using Verint or Calabrio WFM/WFO options to simplify recording and storage. Using a WFM/WFO solution eliminates the need to assemble disparate recording segments captured outside of Five9.

2 Click **Continue**.

Configuring Guest Controls

Guest controls are the controls available for the contact side of Five9 Video Engagement.



1 Enable the selection box beside the control.

> **Note**
> The combination of controls General, Mobile, and Desktop controls, may

contain a maximum of 9 controls.

2 Click **Continue** twice to skip SMS notification.

Creating Additional Use Cases

To create additional use cases, you can follow the procedure above or simply click **Duplicate** beside any existing use case, modifying the name or parameters as desired.

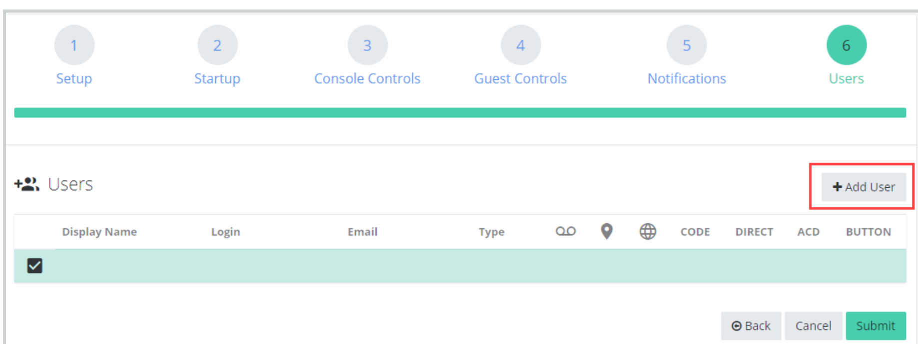
Important

Five9 supports three distinct use cases: Voice only, Video only, and Voice and Video. The naming is case and space sensitive.

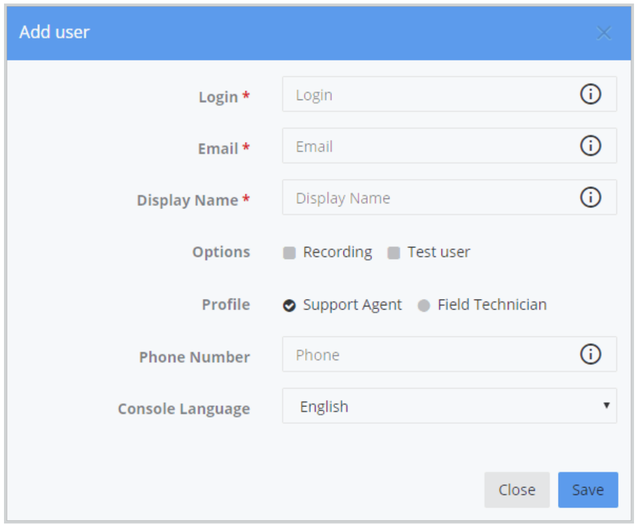
Assigning User to Use Cases

To associate use cases with the agents, follow these steps:

1 Click **+Add User**.



2 See **Creating a User**.



Creating Video Engagement Agents

Before creating Video Engagement agents in SightCall, you must have an agent ID and a domain ID. The agent ID is available in the Agent Information report. If you are uncertain of your domain ID, contact your Five9 representative.

Important

Each SightCall user is a unique combination of agent ID and domain ID in this format: **domainID_agentID**.

Creating a User
Coding Use Cases

Creating a User

To create a user, follow these steps:

1 Log in to SightCall Admin at https://admin.sightcall.com.

2 Select **Users** from the Console menu.

3 Click **+Add User**.

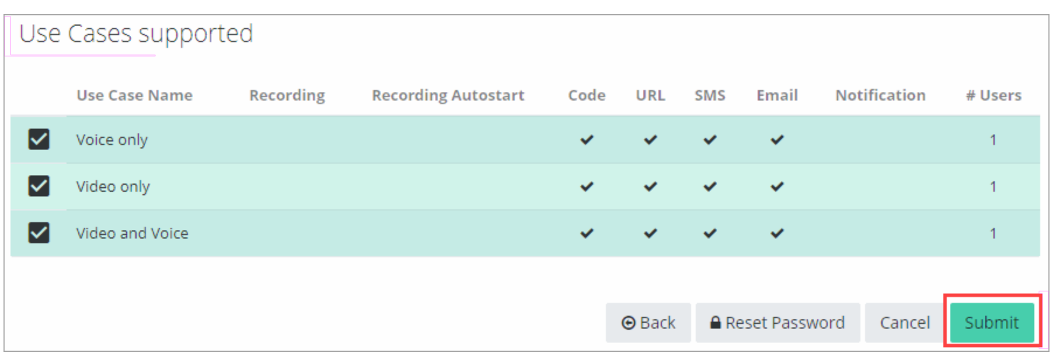
4 Populate user properties.

- Profile: Support Agent
- Login: domainID_agentID
- Email: Valid Five9 agent email
- Phone Number:
- Display Name:
- Options: Recording or Test User
  Use the Test User when you do not want the calls of this user to be counted in the statistics.
- Console Language:
  - English
  - French
  - German
  - Dutch
  - Brazilian Portuguese
- TCP Port: Default
- Personal Folders: No. Accept default.

5 Click **Continue**.

Coding Use Cases

Select the use cases for this agent and click **Submit**.



Preparing the Agent's Workstation

The SightCall system installer is required in the agent workstation.

Comparing Standard Installer and Admin Installer

SightCall recommends using the standard installer when possible. The file extensions are MSI for Windows and PKG for Mac operation systems.

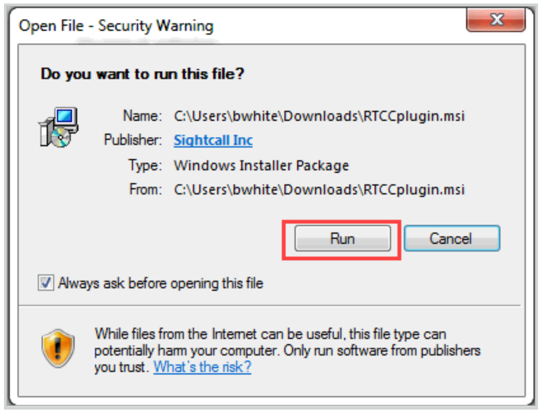
Warning
Do not use both installers in the same computer.

	Standard Installer	Admin Installer
Access to all SightCall features	Yes	Yes
Deployment without Admin rights	Yes	No
Automatic upgrades	Yes	No
Users have limited rights	No	Yes

Using the SightCall Standard Installer

The benefit to using the standard installer is the SightCall automatic upgrade system. Deploying any new version overwrites the previous version. While the standard system installer can be used for bulk installation, SightCall recommends browser installation for each user.

1. Download the SightCall plug-in.
2. Install the plug-in.



Using the SightCall Admin System Installer

The Admin plugin is an alternative when the standard plug-in cannot be installed or used properly, for example:

- Users do not have write access to personal folders.
- Personal folders are remote with limited resources.
- Corporate policy prohibits installing programs in personal folders.
- Workstations are shared by several users.

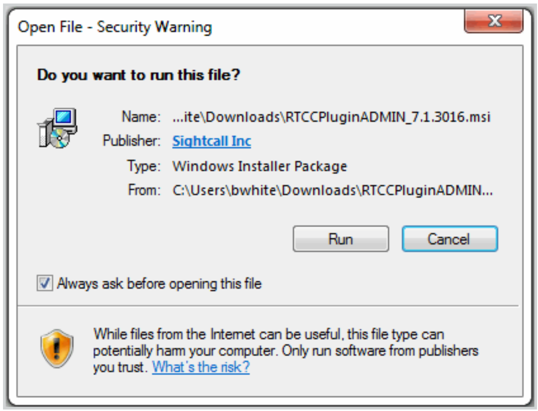
SightCall recommends that you completely remove your SightCall installation when switching between a standard and admin installer. Removal must be performed by a system administrator using the command lines shown below.

```
wmic product where name="npRTCCplugin" call uninstall

rd /S /Q "%APPDATA%\npRTCCplugin"

rd /S /Q "%LOCALAPPDATA%\Microsoft\Windows\Temporary Internet
Files\Virtualized\C\Users"

rd /S /Q "%LOCALAPPDATA%\VirtualStore\Program Files
(x86)\Google\Chrome\Application"

rd /S /Q "%LOCALAPPDATA%\VirtualStore\Program
Files\Google\Google\Chrome\Application"
```

To use the SightCall admin system installer:

1 Download the system installer.

2 Install the plug-in.



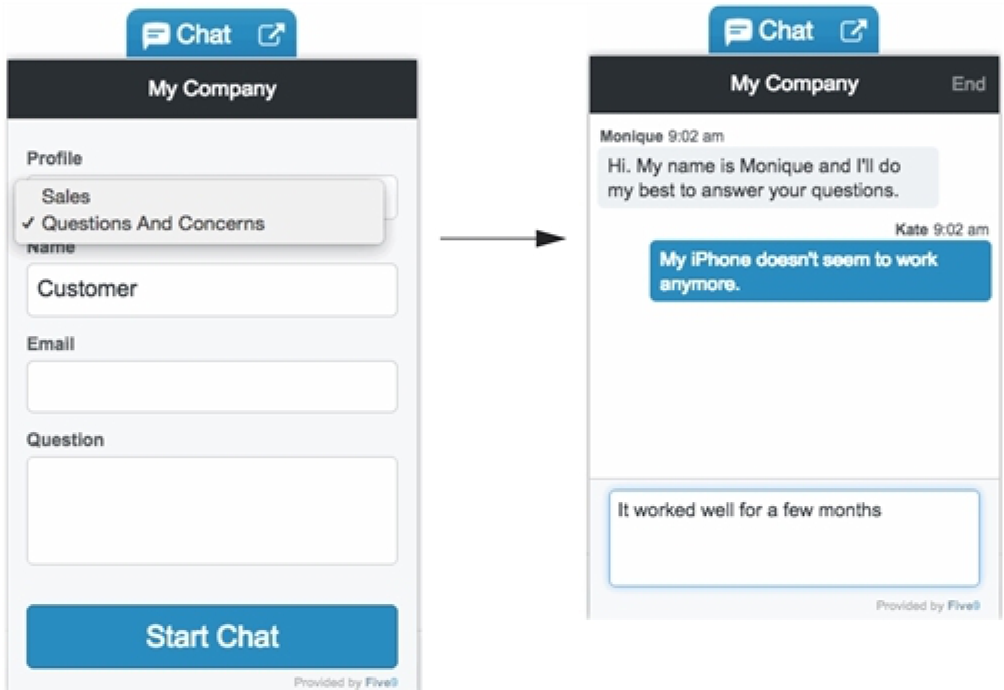
Chat Interactions

Chat interactions enable you to close a sale, prevent the abandonment of shopping carts, anticipate a customer's support request, and handle the request with chat instead of voice, which has a higher cost.

> **Important**
>
> Five9 does not recommend sending shared attachments with personally identifiable information (PII) data. Any attachment with PII should be attached directly to only one contact. If you choose to send an attachment with PII data to multiple users, the compliance responsibility for the California Consumer Privacy Act (CaCPA) and the General Data Protection Regulation (GDPR) is your responsibility to address. Five9 will only purge attachments that are related to a single user. If you use an attachment to send to multiple users when we purge for one of the users then that shared attachment will also be purged.

Overview of Chat

The chat console enables your agents to communicate with your customers in real time. This example shows a customer requesting help with a recent purchase.



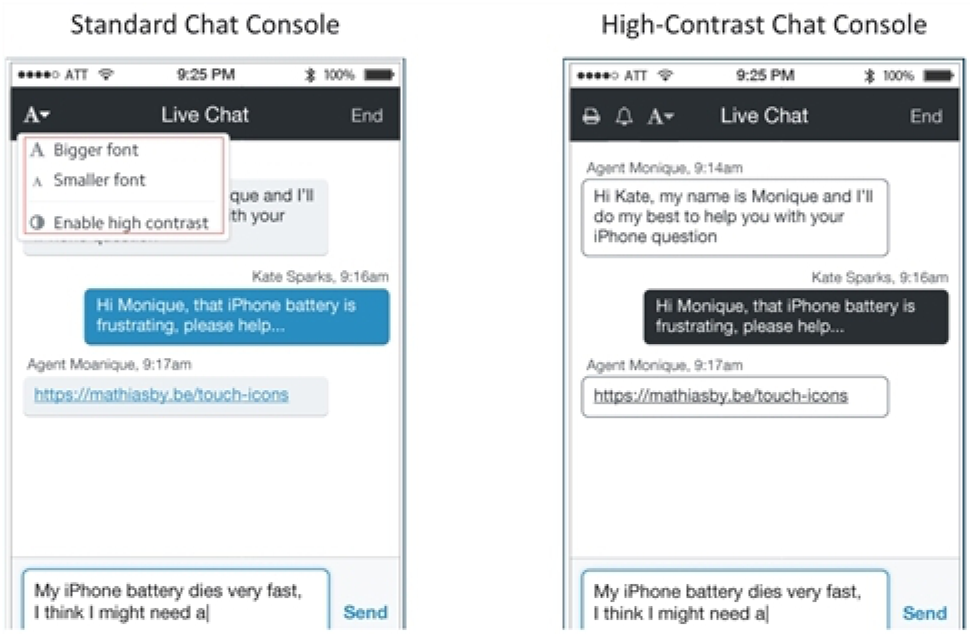
You can customize many features shown above, such as the email field, the chat tab, and the style. For more information, see Adding Fields and Customizing Labels.

Important

Ensure that you are using the correct chat console version for your agent interface: Java-based chat console for Java-based agents and web-based chat console for web-based agents. For the URLs of the digital engagement administrator interface for Plus applications and Java client, see the Technical Requirements guide. If you have questions about your agent interface, contact your Five9 representative.

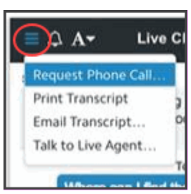
High Contrast Chat Console

Five9 Chat web form contains type size and high contrast view options that meet the requirements for ADA (Americans with Disabilities Act). The user can select font sizing or high contrast by clicking the **fonts** icon, located at the top, left position in their chat console.



Chat Console Menu Options

The chat console menu options enable the end-user to request a phone call, live agent, or transcript of the chat interaction.



Audience

This chapter is intended for web developers who understand these technologies:

- REST API architecture
- HTTP, HTTPS, and WebSocket protocols
- JavaScript, JSON, and jQuery
- HTML5 and CSS

Adding an Email Button

You may add an email option for your customers to use when no agents are logged in to chat with them. You may show or hide this option as needed. This setting applies also to the email option in the proactive chat form. To hide the **Send Email** button, set the `showEmailButton` parameter to `false` in the JavaScript function or directly into the URL query string.

```
Five9SocialWidget.addWidget({
    type: 'chat',
    rootUrl: '../',
    tenant: 'tenant',
    profiles: 'profiles',
    title: 'title',
    showEmailBut
```

See **Overview of Email** for more on configuring and customizing email options.

Survey Console

The Five9 consoles enable the Survey Console so that your customers provide feedback about their experience before leaving your web site.

Configuring Chat Interactions

Chat interactions enable you to close a sale, prevent the abandonment of shopping carts, anticipate a customer's support request, and handle the request with chat instead of voice, which has a higher cost.

Important

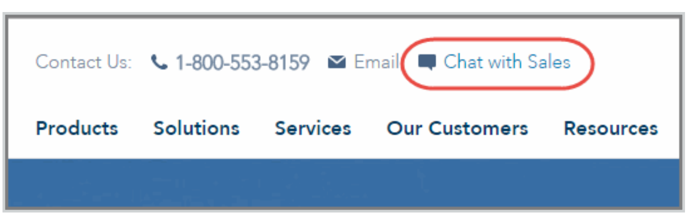
Five9 does not recommend sending shared attachments with personally identifiable information (PII) data. Any attachment with PII should be attached directly to only one contact. If you choose to send an attachment with PII data to multiple users, the compliance responsibility for the California Consumer Privacy Act (CaCPA) and the General Data Protection Regulation (GDPR) is your responsibility to address. Five9 will only purge attachments that are related to a single user. If you use an attachment to send to multiple users when we purge for one of the users then that shared attachment will also be purged.

Understanding Chat Types

Five9 offers several chat types to best match your business needs:

Basic Chat

Basic chat offers an additional interaction media type to your customers through desktop and mobile applications. A basic chat interaction enables you to capture and retain customer data by using a form that customers can complete before engaging in the chat interaction. Basic chat is presented to your customers as a Chat Now or similar button with an optional form following a click event.

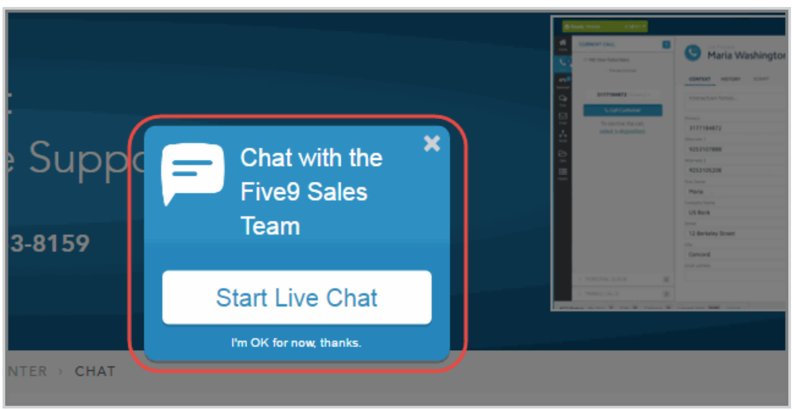


Proactive Chat

Proactive chat offers are tailored to enhance customer support and lead or sale conversion by using specific triggers, such as time spent on a page, a series of clicks, or mouse hover time.

Example

A customer makes repeated visits to a product description or an FAQ topic. You can offer assistance in the form of a chat. When the customer clicks **Start Live Chat** in one of your web pages, an interaction is queued for the next available chat agent.



Preview Chat

Preview chat is a subset of proactive chat that provides the same elements as proactive chat.

Important

Preview chat overrides proactive chat.

Preview chat generates a proactive chat request based on the customer's context data, browsing behavior, and demographic information. Agents can then prepare a personalized chat message before engaging the customer.

To use preview and proactive chat, you must define separate preview and proactive chat profiles in the Digital Engagement Administrator interface. For more information, see Configuring Profiles to Support Proactive and Preview Chat.

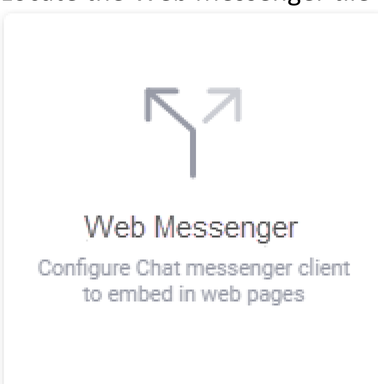
Configuring Web Messenger in Admin Console (Advanced Chat)

Chat interactions enable you to close a sale, prevent the abandonment of shopping carts, anticipate a customer's support request, and handle the request with chat instead of voice, which has a higher cost.

Logging In

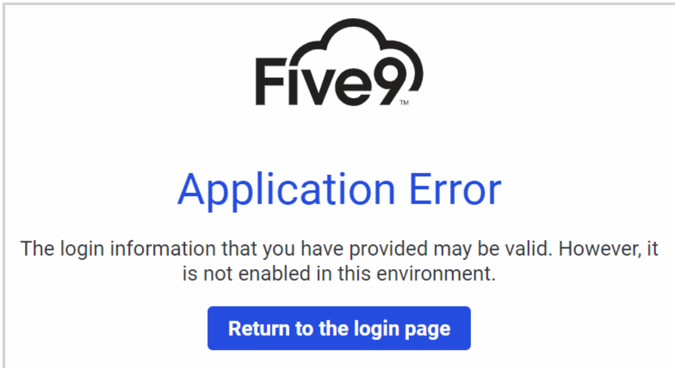
You use the Five9 Administrator Console to log into your Five9 account and access Web Messenger

1. Enter the URL that applies to your location.
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/
2. Log in.
3. Locate the Web Messenger tile on your Home screen, and select it.



   The Web Messenger tab opens and you can configure your messenger.

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



> **Note:** If you don't see the Web Messenger card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

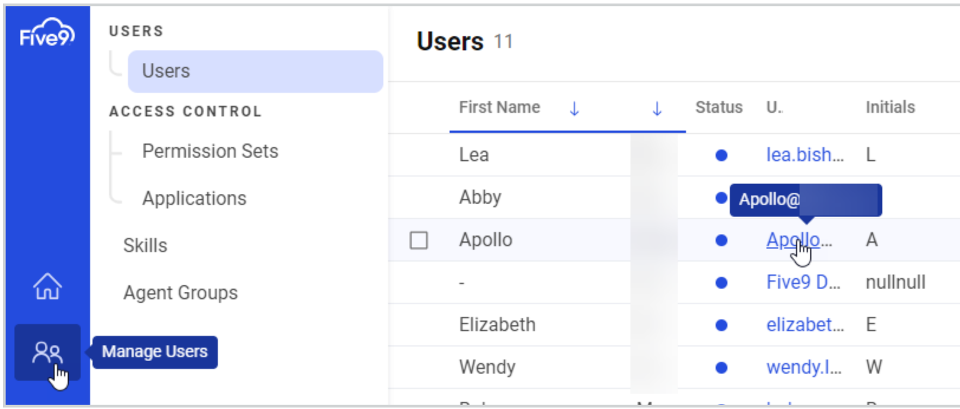
Permissions and Permission Sets

Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view the Web Messenger card in Admin Console.

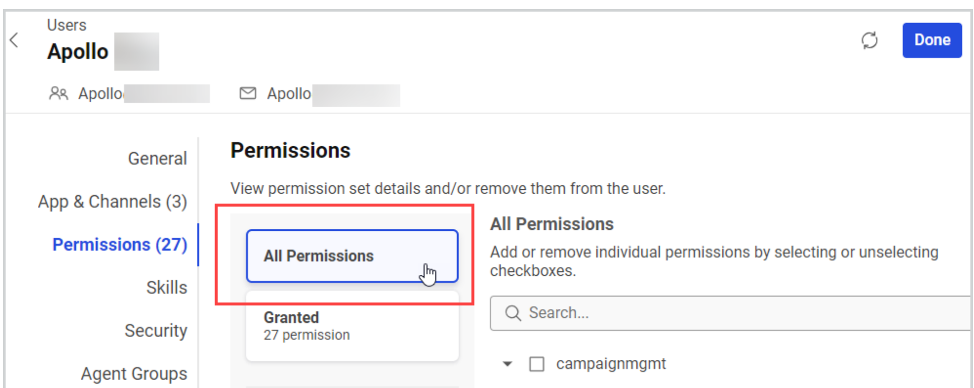
> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

Assigning Permission Sets

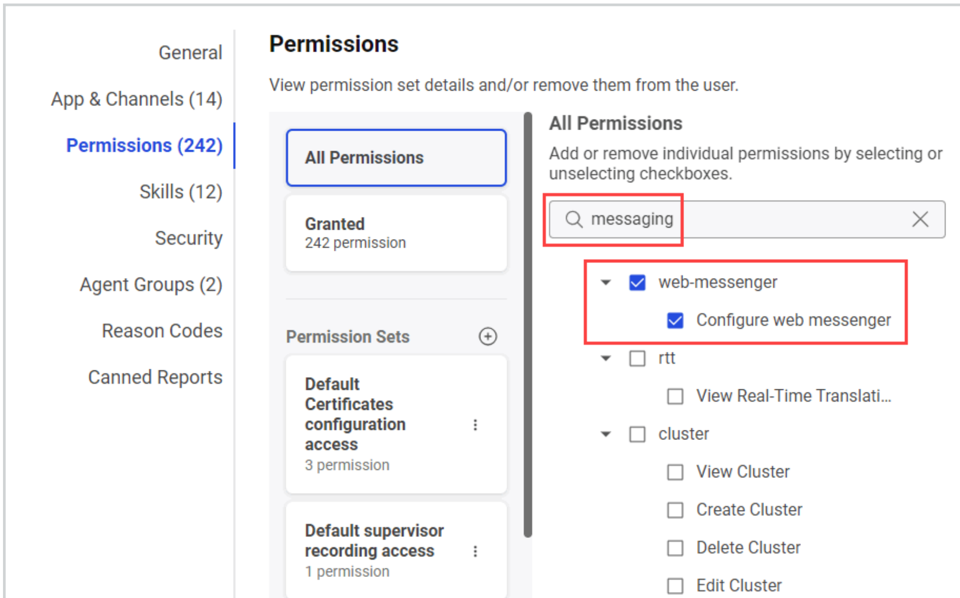
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select the available permission set for the application.



3 Type the permission group name from the table in [Configuring Web Messenger in Admin Console (Advanced Chat)]() into the search field or scroll the list to the permission group, and select the desired permissions or group.

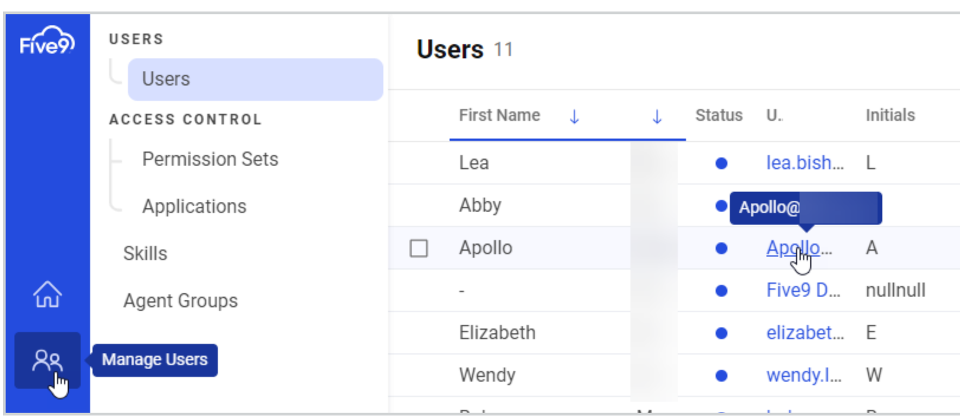


4 Select **Done**.

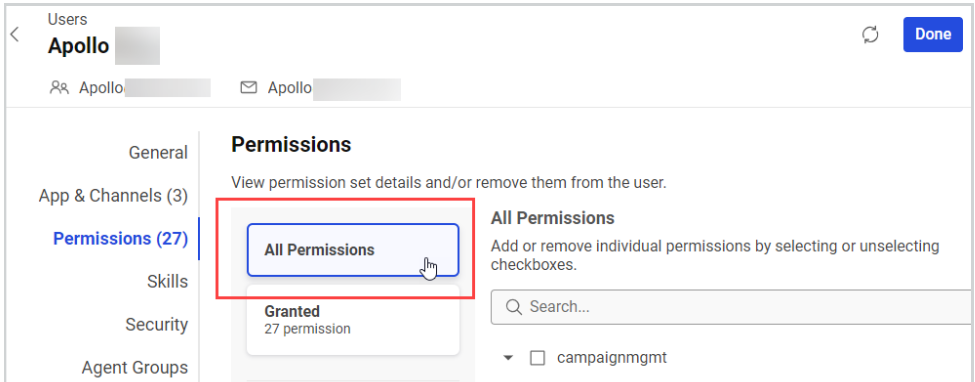
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

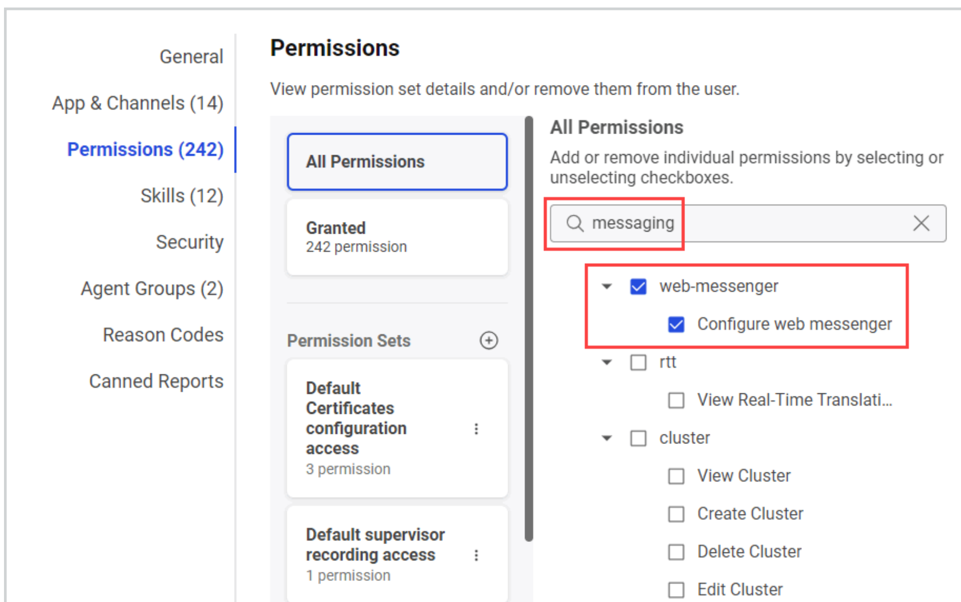
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select All Permissions.



3 Type the permission group name from the table in [Web Messenger Permissions](#) into the search field or scroll the list to the permission group, and select the desired permissions or group.



4 Select **Done**.

For more information on assigning permissions, see *[Permissions and Permission Sets](#)* in the Five9 Admin Console documentation.

Web Messenger Permissions

This section presents the individual user permissions required to view the Web Messenger card on the Admin Console home page and access the described features. The Web Messenger permissions are:

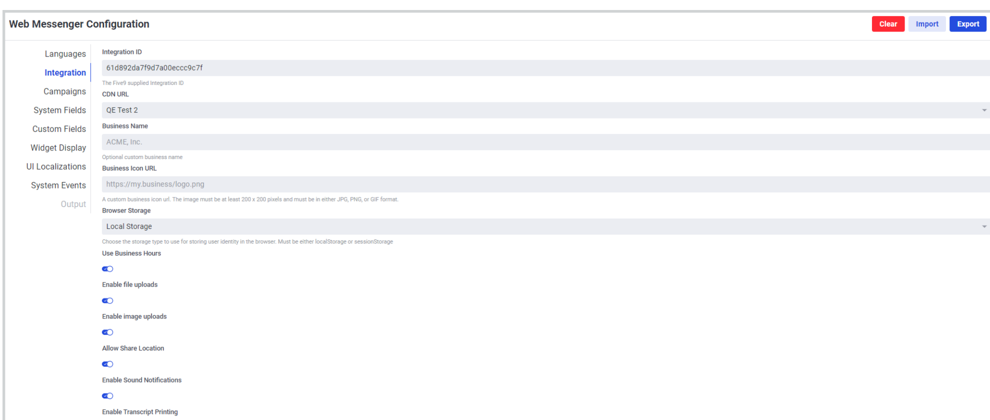
Group	Subset	Permission	Description
messaging	web-messenger	Configure web messenger	Configure your messenger.

Important

Five9 does not recommend sending shared attachments with personally identifiable information (PII) data. Any attachment with PII should be attached directly to only one contact. If you choose to send an attachment with PII data to multiple users, the compliance responsibility for the California Consumer Privacy Act (CaCPA) and the General Data Protection Regulation (GDPR) is your responsibility to address. Five9 will only purge attachments that are related to a single user. If you use an attachment to send to multiple users when we purge for one of the users then that shared attachment will also be purged.

Configuring Integration Options

Click Integration to enter the configuration details for your messenger.



Option	Definition
Integration Identifier	Your Integration ID automatically populates.
Business Name	The name of your business. This is an optional custom business name.

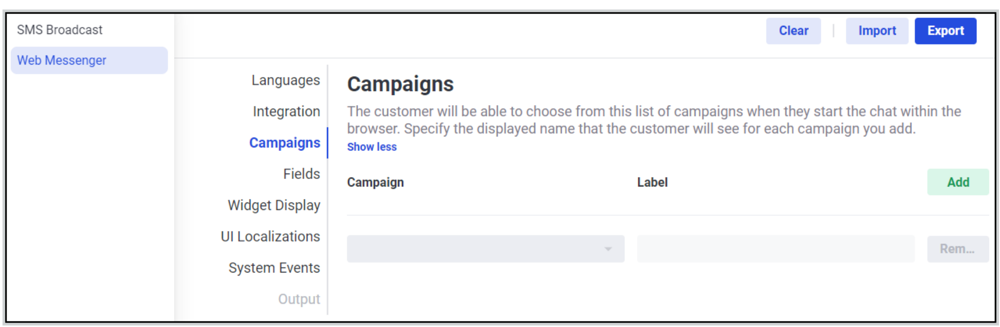
Option	Definition
Business Icon URL	The URL to the desired custom business icon that will display in the messenger. **Important:** The image must be at least 200 x 200 pixels and in JPG, GIF, or PNG format.
Browser Storage	Messenger data can be stored in memory, locally or by session. Select the storage type to use for storing user identify in the browser. • **Memory**: The data is stored in browser memory as long as the user does not refresh the web page. If the user refreshes the page, the chat history and any ongoing conversation data is removed. This is different the **Session** type where the data is only removed when the user closes the browser. Do not select the Memory option if you require data to persist. • **Local**: The data is stored locally and the user can access the information after a chat conversation. • **Session**: The data is stored in browser memory when a user refreshes the page, and persists until the user closes the browser. This is different than the **Memory** type where the data is removed when the user refreshes the page (or closes the browser).
Use Business Hours	• **Enabled**: Indicates that messenger is available by defined business hours. • **Disabled**: Indicates that messenger is not available by defined business hours.
Enable file uploads	• **Enabled**: Users can upload files to the message. • **Disabled**: Users cannot upload files to the message.
Allow Share Location	• **Enabled**: Users can share their location. • **Disabled**: Users cannot share their location.
Enable Sound Notifications	• **Enabled**: Users can choose to receive audible notification alerts. • **Disabled**: Users cannot receive audible notification alerts.
Enable Transcript Printing	• **Enabled**: Users can print the conversation transcript. • **Disabled**: Users cannot print the conversation

Option	Definition
	transcript.
Clear Messages History Timeout	The number of seconds after the chat has ended until the Five9 server clears message history. By default, the time is 3 seconds. Enter "0" for the history to persist. The Five9 server clears messages as soon as the chat ends, therefore file download links will not work after the conversation has ended.

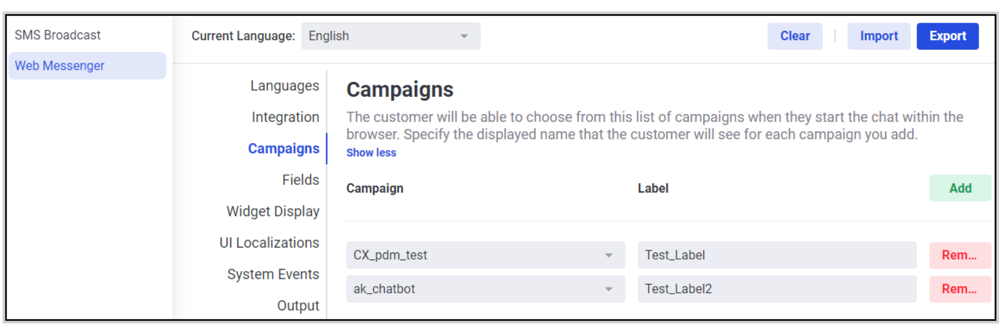
Configuring Campaign Options

You must select a campaign to enable the Output tab in Web Messenger. Campaigns allow you to route conversations to the correct agent. If only one campaign is selected, you are not required to edit or provide the label for that campaign. However, if you select two or more campaigns, you must provide a unique campaign label for each. The Output tab is disabled if two or more campaigns are selected but labels are not provided.

Click Campaigns to add campaigns to display on your messenger.



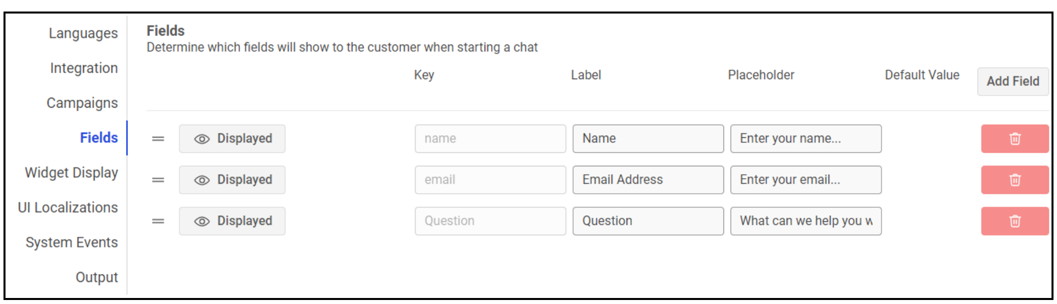
To add a campaign to your messenger, click the plus sign. Any campaigns already added will appear.



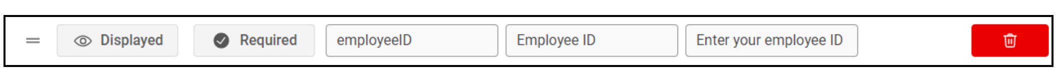
Option	Definition
Campaigns Drop-down Menu	Select the campaign you want to assign from the drop-down menu. **Note:** When there are multiple campaigns, a select box with this label will be displayed to the user to choose that campaign.
Add	Click to add a campaign.
Remove	Click to remove the campaign in that row.
Campaign (Column)	Lists all selected campaigns.
Label (Column)	Lists the label or name of all selected campaigns. The label for each campaign can be edited. **Note:** When configuring additional languages, the Campaign Labels must also be edited in those languages.

Configuring Fields Options

Click Fields to create, remove, hide, and display custom fields in your messenger.



This image shows an example of a new custom field set as required:



Important

The name, email, and question fields are required. When you set the field as **Displayed**, the end user must provide the information in the capture form (see **Test Web Messenger in the Widget** before the starting the chat. If you prefer to hide these fields from the end user, the information is still required.

Option	Definition
Add Field	Click to add a custom field.
Trash Can Icon	Click to delete a custom field.
Double Line Icon	Click to drag and reorganize fields.
name	**Required system field**: The user's name.
email	**Required system field**: The user's best email address for contact.
Question	**Required system field**: Indicates the question presented to the user.
Eye icon	Indicates if the field is to be displayed or hidden.
Required or Optional *(applies to custom fields only)*	Set the field as required or optional for the user when you add a custom field. Setting it to **Required** means the user cannot continue a chat without entering the information indicated.
Label	The title or word to display for this field in the conversation. Example: Name **Note:** This is visible only when Displayed is selected for the field and the text is only populated for English. You must manually enter the text for other languages.
Placeholder Text	The text to display for this field in the conversation. Example: Enter your name. **Note:** This is visible only when Displayed is selected for the field and the text is only populated for English. You must manually enter the text for other languages.

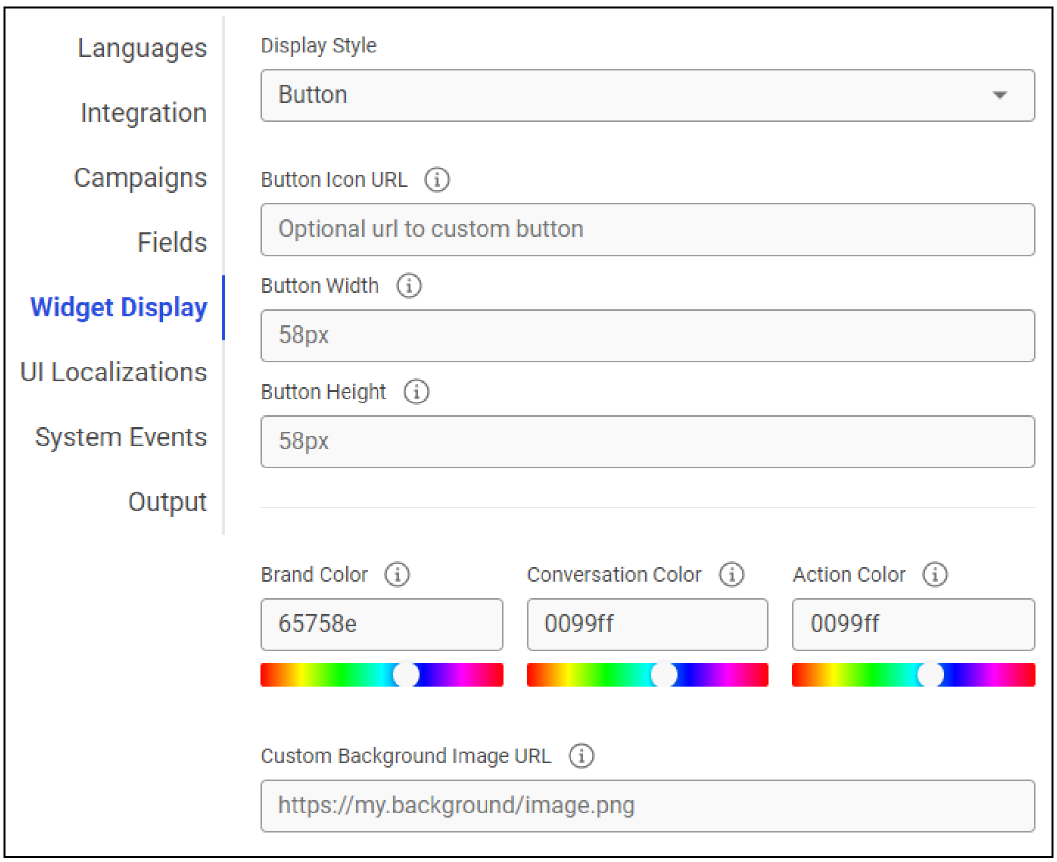
The transcript for the conversation is supported only in the languages that Five9 supports. You can add `UserLocale CAV` under `fields` that allows you to change the language of the transcript sent to the recipient. The chat conversation included in the transcript is in the language used during the chat. For information on `UserLocale CAV` used in Script Generator, see **Using the Script Generator**.

Configuring Widget Display

Click Widget Display to select the attributes of a custom widget such as a button, tab, or an embedded widget.

> **Note**
> You can configure your messenger to appear on your website as a button, as a tab, or your can choose to embed the widget into your page.

Widget Display: Button



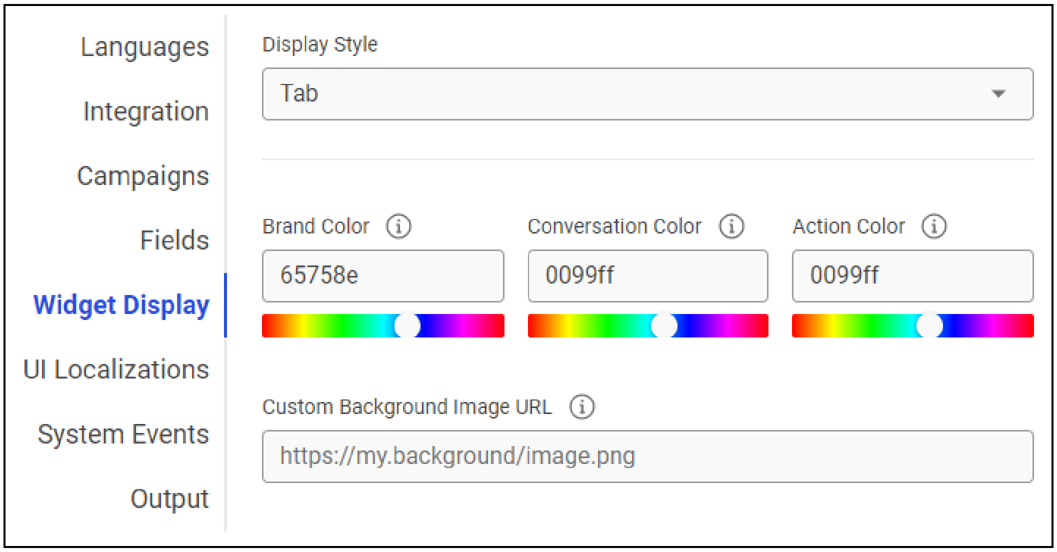
To customize a Button:

1 Select Button from the Display Style drop-down list.

2 Complete the size and color options, and the desired background URL.

Option	Definition
Button Icon URL	Enter a URL to add a custom button image or icon. **Note:** When the Display Style is button, you have the option of selecting your own button icon. The image must be at least 200 x 200 pixels and must be in either JPG, PNG, or GIF format.
Button Width	Enter the desired width of the button. **Note:** When the Display Style is button, you have the option of specifying the button width.
Button Height	Enter the desired height of the button. **Note:** When the Display Style is button, you have the option of specifying the button height.
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the widget. **Note:** Image will be tiled to fit the window.

Widget Display: Tab

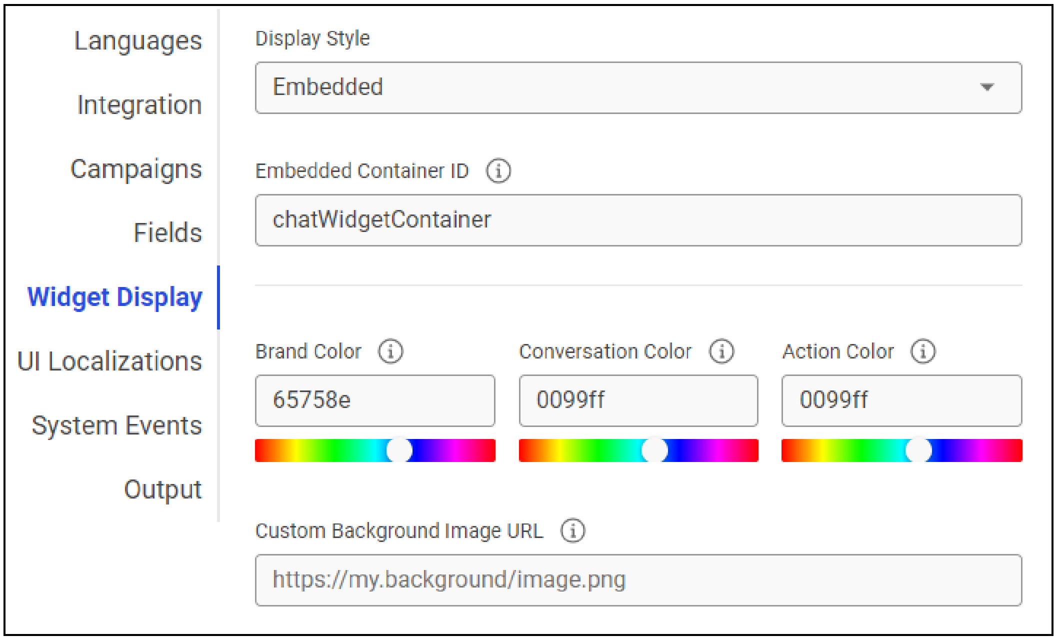


To customize a Tab:

1. Select Tab from the Display Style drop-down list.
2. Complete the color options and desired background URL.

Option	Definition
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the conversation box. **Note:** Image will be tiled to fit the window.

Widget Display: Embedded



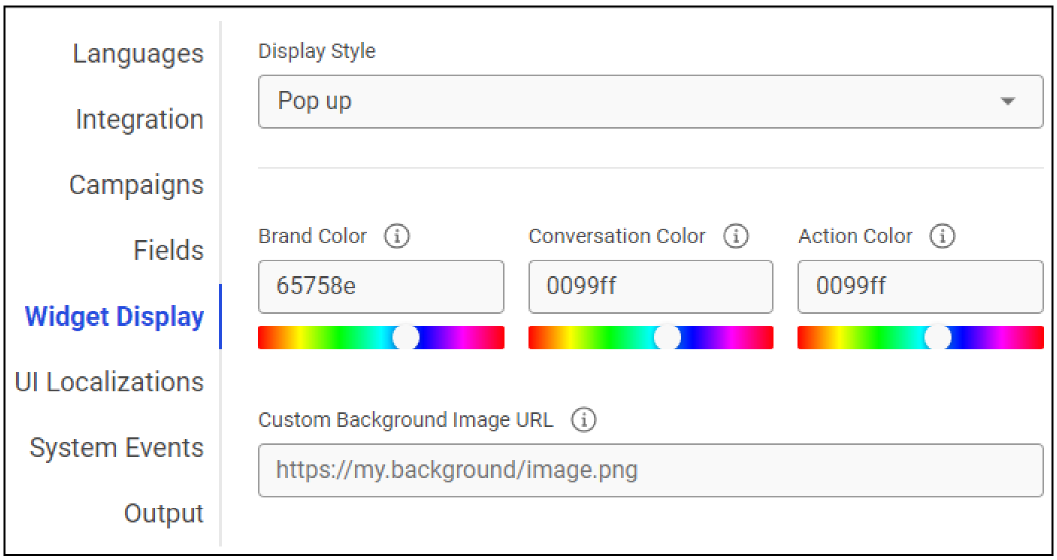
To customize an Embedded style:

1. Select Embedded from the Display Style drop-down list.
2. Complete the color options and desired background URL.

Option	Definition
Embedded Container ID	Enter the DOM element ID that will contain the widget.
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image	Enter a URL to include a custom background image in

Option	Definition
URL	the widget. **Note:** Image will be tiled to fit the window.

Widget Display: Pop up



Note

Defining a custom pop up for chat conversations, displays the chat in a separate pop up. This allows users to access other websites during a chat.

To customize a Pop up:

1. Select Pop up from the Display Style drop-down list.
2. Complete the color options and desired background URL.

Option	Definition
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want

Option	Definition
	for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the conversation box. **Note:** Image will be tiled to fit the pop up.

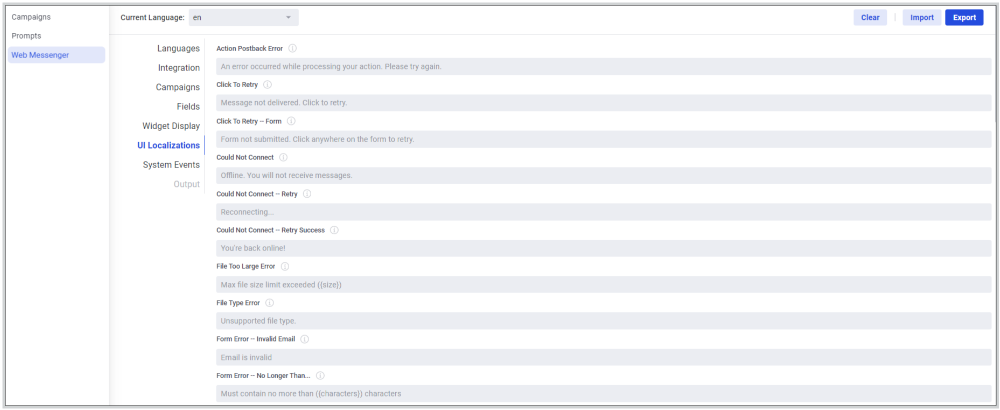
Configuring UI Localizations

The message and prompt options on the UI Localizations tab provide pre-configured text and prompts within the messenger widget. Examples include Start (starts the conversation), Complete the Form (tells the user to enter their name, email, and question), and Delivered (displays when a message is delivered to the agent). Each localization option has a specific action or reaction correlated to the widget. Suggested text appears in the grey field and will display for the user if you do not enter different text.

> **Note:** You can configure the options here even if you are only configuring English.

> **Important:** You must manually change each UI localization option for each configured language. If localization options are not configured, the user will see the text for each prompt in English. These localizations are not managed by Real Time Translation. For more information, see Configuring Language Options for Real Time Translation.

Click the UI Localizations tab to configure the text that appears as a response to several actions.



Note

The fields are grouped in screen captures and tables by ten or five for easier navigation.

Option	Definition
Action Postback Error	Enter the text you want to appear when a processing error occurs. Example: An error occurred while processing your action. Please try again.
Click to Retry	Enter the text that tells the user to retry sending the message. Example: Message not delivered. Click to retry.
Click to Retry -- Form	Enter the text that tells the user to retry submitting the form. Example: Form not submitted. Click anywhere on the form to retry.
Could Not Connect	Enter the text you want to appear when a user is offline. Example: Offline. You will not receive messages.
Could Not Connect - Retry	Enter the text you want to appear when a conversation is reconnecting. Example: Reconnecting...
Could Not Connect - Retry Success	Enter the text you want to appear when the attempt to reconnect is successful. Example: You're back online!

Option	Definition
File too Large Error	Enter the text for when the file the user is attempting to send is too large. Example: Max file size limit exceeded ({size}).
File Type Error	Enter the text for when the file the user is attempting to send is in an unsupported format. Example: Unsupported file type.
Form Error - Invalid Email	Enter the text for when the email provided by the user is invalid. Example: Email is invalid.
Form Error - No Longer Than...	Enter the text for when a field in the form must contain fewer than *x* characters. Example: Must contain no more than *x* characters.
Form Error - No Shorter Than...	Enter the text for when a field in the form must contain at least *x* characters. Example: Must contain at least *x* characters.
Form Error - Unknown	Enter the text for when error is unknown. Example: This doesn't look quite right.
Form Field - Select Placeholder Fallback	Enter the text for when the user needs to select an option. Example: Choose one.
Header Text	Enter the text you want to appear at the start of the conversation. Example: How can we help?
Image - Click to Reload	Enter the text that tells the user to click to reload an image. Example: Click to reload image.
Image - Click to View	Enter the text that tells the user to click to view an image. Example: Click to view {size} image.
Image - Preview Not Available	Enter the text that tells the user that a preview is not available. Example: Preview not available.
Input Placeholder	Enter the text to use as a placeholder. Example: Type a message.
Input Placeholder - Blocked	Enter the text that tells the user to complete a form.

Option	Definition
	Example: Complete the form above.
Intro App Text	Enter the text that tells the user they can message you from this site or from an application. Example: Message us below or from your favorite app.
Location Not Supported	Enter the text that tells the user their browser does not support location services or that location services have been disabled in their browser settings. Example: Your browser does not support location services or it's been disabled. Please type your location instead.
Location Security Restriction	Enter the text that tells the user the website cannot access their location. Example: This website cannot access your location. Please type your location instead.
Location Sending Failed	Enter the text that tells the user their attempt to send their location failed. Example: Could not send location
Location Services Denied	Enter the text that tells the user the website cannot access their location. Example: This website cannot access your location. Allow access in your settings o type your location instead.
Message Error	Enter the text that tells the user an error occurred when they sent their message. Example: An error occured while sending your message. Please try again.
Message Indicator Title (Plural)	Enter the text that displays the number of new messages. Example: Formula: {count} New Messages Information: count = 5 Result: 5 New Messages
Message Indicator Title (Singular)	Enter the text that displays one new message. Example: Formula: {count} New Message Information: count = 1

Option	Definition
	Result: 1 New Message
Message Time - Days	Enter the text that indicates how many days prior the message was received. Example: Formula: {value}d ago Information: value = 3 Result: 3 days ago
Message Time - Hours	Enter the text that indicates how many hours prior the message was received. Example: Formula: {value}h ago Information: value = 2 Result: 2 hours ago
Message Time - Just now	Enter the text that indicates a message was just received. Example: Just now
Message Time - Minutes	Enter the text that indicates how many minutes prior the message was received. Example: Formula: {value}m ago Information: value = 4 Result: 4 minutes ago
Message Timestamp Format	Enter the format in which you want the time to appear. Example: Format: h:mm A Result: 10:00 AM
Message Delivered	Enter the text that tells the user a message was delivered. Example: Delivered.
Message Seen	Enter the text that tells the user a message was seen. Example: Seen
Message too long	Enter the text that tells the user the message they tried to send was too long. Example: Max message size limit exceeded {size}.

Option	Definition
Notification Settings - Connected	Enter the text that notifies the user they are connected to the conversation. Example: Connected
Send Button Text	Enter the text to display on the button the user must click to send a message. Example: Send
Share Location Text	Enter the text to display on the button the user must click to share their location. Example: Share Location
Unsupported Message Type	Enter the text that tells the user the message they sent is in an unsupported type. Example: Unsupported message type.
Unsupported Action Type	Enter the text that tells the user the action they tried is unsupported. Example: Unsupported action type.
Upload Document	Enter the text to display on the button the user must click to upload a document. Example: File
Upload Invalid Error	Enter the text that tells the user the file they tried to upload is invalid. Example: Invalid file
Upload Photo	Enter the text to display on the button the user must click to upload an image. Example: Image
Upload Virus Error	Enter the text that tells the user the file they tried to upload was rejected because a virus was detected. Example: A virus was detected in your file and it has been rejected

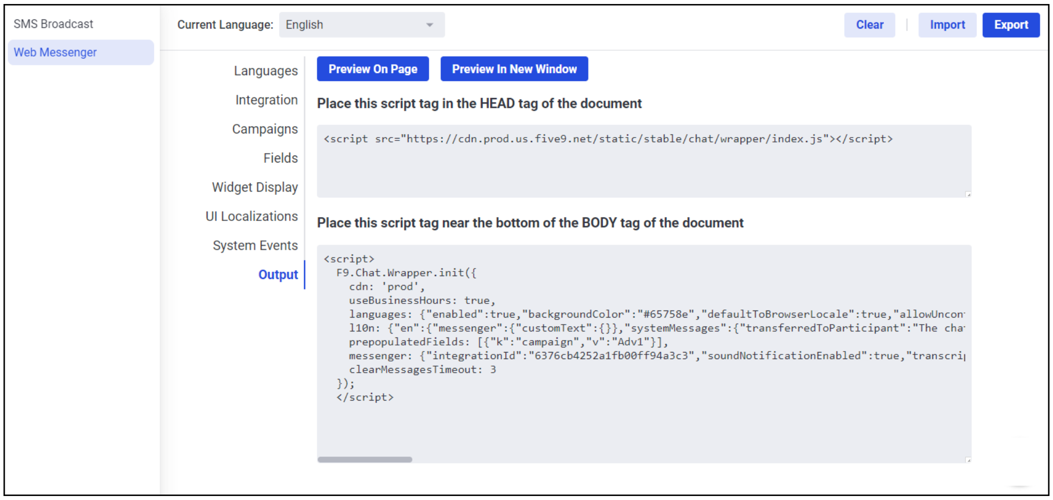
Configuring System Events

Click System Events to configure the text for designated system events.

Option	Definition
Conversation Created	Enter the text you want to appear when a conversation is created. Example: We're connecting you to a live agent right now. We'll let you know as soon as they are connected.
Participant Accepted	Enter the text you want to appear when a participant accepts the conversation. Example: You've been connected to an agent.
Participant Joined	Enter the text you want to appear when a participant joins the conversation. Example: A participant has joined the chat.
Participant Left	Enter the text you want to appear when a participant leaves the conversation. Example: A participant has left the chat.
Transferred to Participant	Enter the text you want to appear when the message is transferred to a participant. Example: The chat has been transferred to {name}.
Transferred to Group	Enter the text you want to appear when the message is transferred to a group. Example: The chat has been transferred to group {group}. Please wait for another agent to continue the conversation.
Conversation Terminated	Enter the text you want to appear when the conversation ends. Example: The conversation has ended.

Configuring Output

Click Output to access the script tabs to deploy your messenger. You can also preview the widget configurations in a new window, or on the current page.



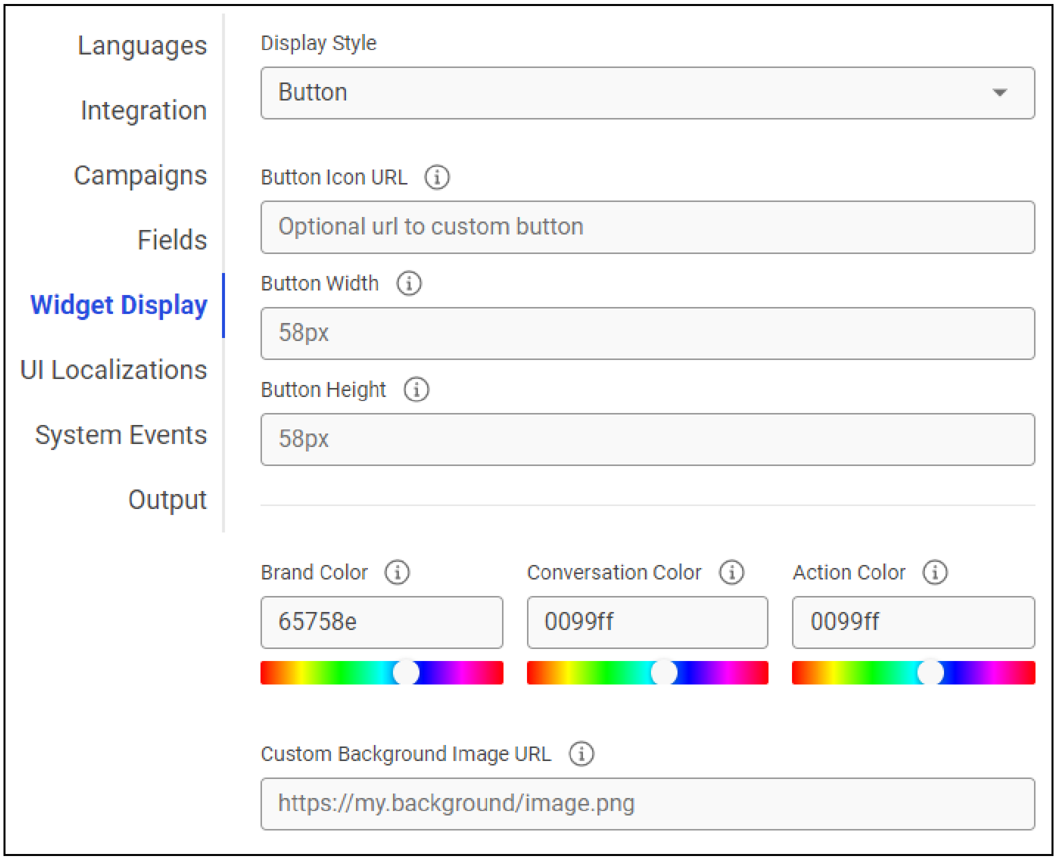
Option	Definition
Preview On Page	Click to test the pre-chat survey in your current browser tab.
Preview In New Window	Click to test the pre-chat survey in a new browser tab.
Head Tag Script	Copy and paste the generated script into the Head Tag of your web page to embed the messenger and enable the widget for end user chatting.
Body Tag Script	Copy and paste the generated script into the Body Tag of your web page to embed the messenger and enable the widget for end user chatting.

Configuring Widget Display

Click Widget Display to select the attributes of a custom widget such as a button, tab, or an embedded widget.

> **Note**
> You can configure your messenger to appear on your website as a button, as a tab, or your can choose to embed the widget into your page.

Widget Display: Button



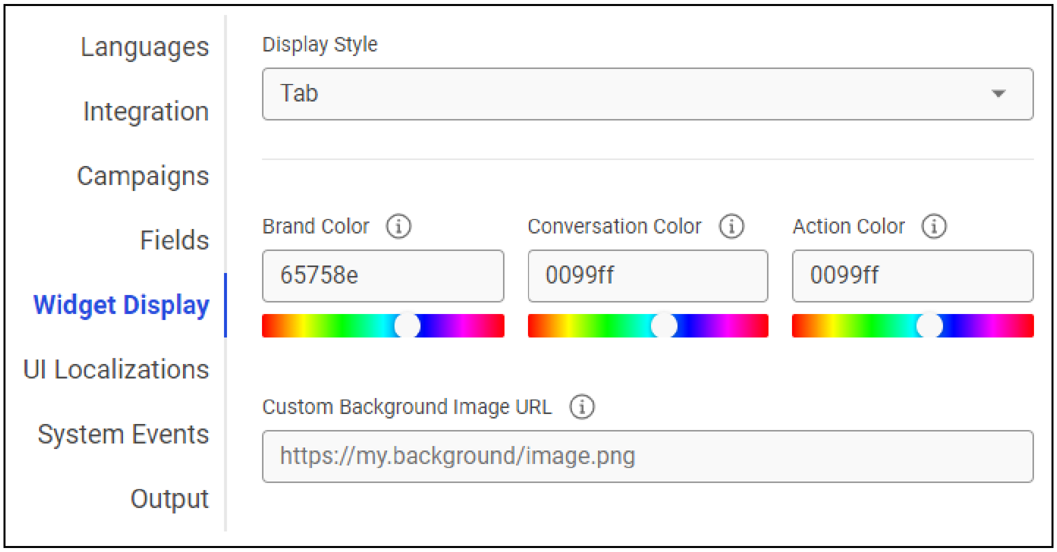
To customize a Button:

1. Select Button from the Display Style drop-down list.
2. Complete the size and color options, and the desired background URL.

Option	Definition
Button Icon URL	Enter a URL to add a custom button image or icon. **Note:** When the Display Style is button, you have the option of selecting your own button icon. The image must be at least 200 x 200 pixels and must be in either JPG, PNG, or GIF format.

Option	Definition
Button Width	Enter the desired width of the button. **Note:** When the Display Style is button, you have the option of specifying the button width.
Button Height	Enter the desired height of the button. **Note:** When the Display Style is button, you have the option of specifying the button height.
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the widget. **Note:** Image will be tiled to fit the window.

Widget Display: Tab

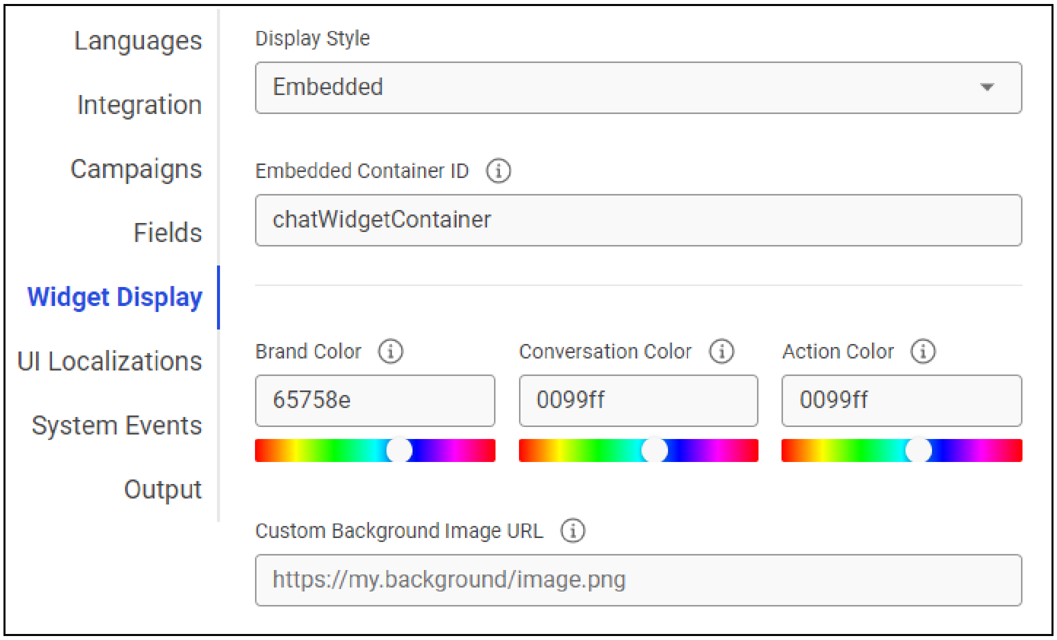


To customize a Tab:

1. Select Tab from the Display Style drop-down list.
2. Complete the color options and desired background URL.

Option	Definition
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the conversation box. **Note:** Image will be tiled to fit the window.

Widget Display: Embedded



To customize an Embedded style:

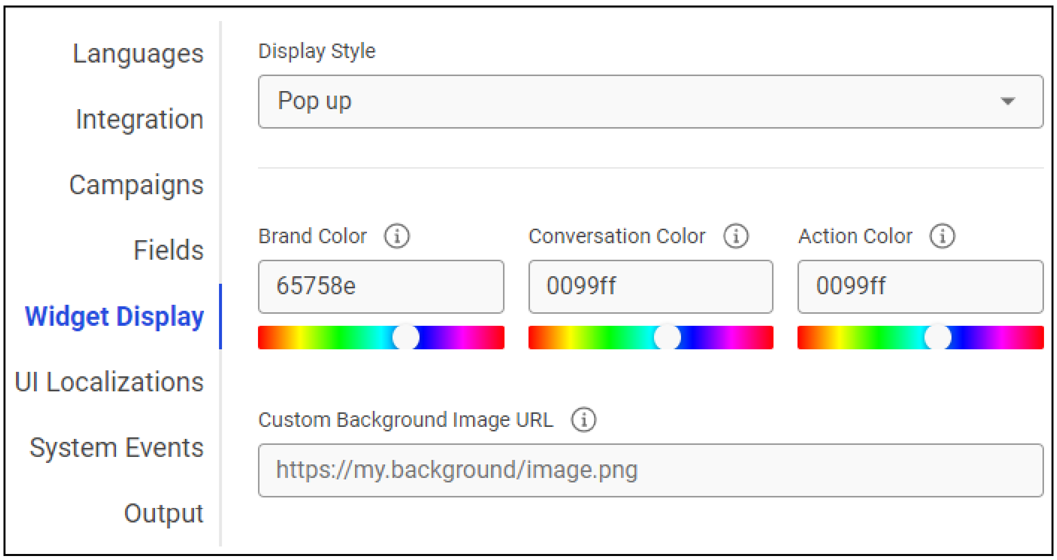
1 Select Embedded from the Display Style drop-down list.

2 Complete the color options and desired background URL.

Option	Definition
Embedded Container ID	Enter the DOM element ID that will contain the widget.
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image	Enter a URL to include a custom background image in

Option	Definition
URL	the widget. **Note:** Image will be tiled to fit the window.

Widget Display: Pop up



Note

Defining a custom pop up for chat conversations, displays the chat in a separate pop up. This allows users to access other websites during a chat.

To customize a Pop up:

1. Select Pop up from the Display Style drop-down list.
2. Complete the color options and desired background URL.

Option	Definition
Brand Color	Enter the three or six-character hexadecimal color of your brand.
Conversation Color	Enter the three or six-hexadecimal color you want

Option	Definition
	for customer messages, quick replies, and actions in the footer of the conversation.
Action Color	Enter the three or six-character color you want for calls-to-action in the conversation.
Live Preview	Click and drag the color slider to see a live preview of your color settings.
Custom Background Image URL	Enter a URL to include a custom background image for the conversation box. **Note:** Image will be tiled to fit the pop up.

Configuring Language Options for Real Time Translation

Real Time Translation uses Google Translate to translate the user's text from a configured or unconfigured language to English for the agent. Real Time Translation only applies to the actual translation within the message between the agent and the user. You can configure the localization and fields to appear in the user's selected language by setting those options on the Language tab and the Fields tab (see Configuring Fields Options).

> **Important:** In order to provide real-time translations of chat conversations on our service, we may use third parties if both parties are writing in different languages. Such conversations will be subject to those third parties' data usage practices. For more information, please refer to our Sub processor List.

Select the Enable Multiple Languages check-box to incorporate additional languages and to configure the settings for each language.

> **Note**
> Keep the check-box unselected to use only the default language.

Configuring Language Options

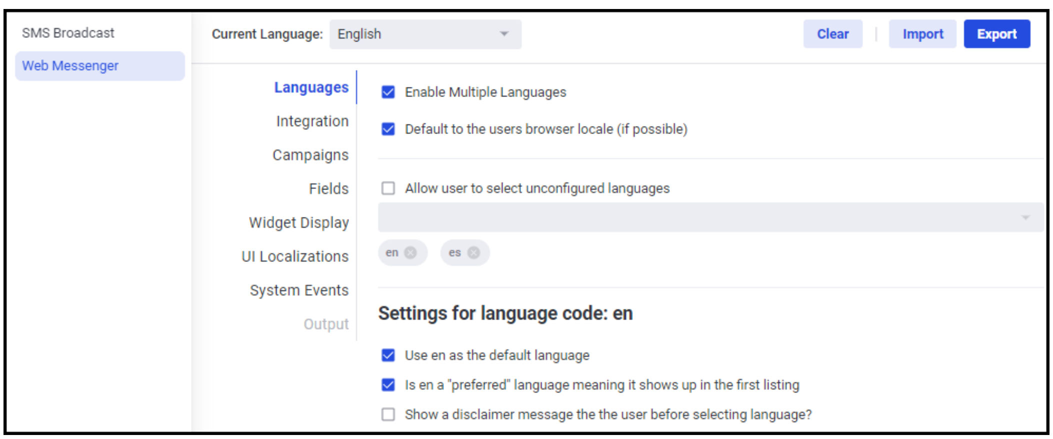
Enabling multiple languages allows end-users to communicate with agents in their native or preferred language. By configuring the settings here, Web Messenger can automatically translate the end-user's text from any configured and selected language to English for the agent using Real Time Translation. It then translates the agent's response text in English to the language selected by the end-user.

The Languages tab allows you to configure the messenger language options, such as adding or removing offered languages, and editing the content settings for each language.

Select the Enable Multiple Languages check-box to incorporate additional languages and to configure the settings for each language.

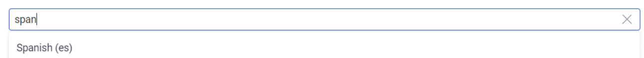
Note

Keep the check-box unselected to use only the default language.



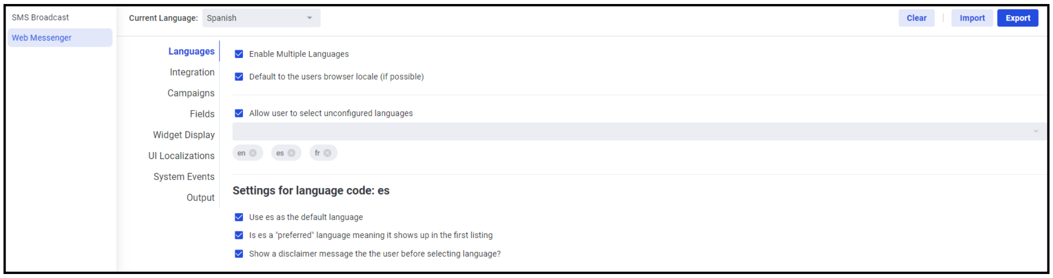
To add a language to the Current Language drop-down list at the top of the screen, type the name of the language into the gray box. Language options will populate and you can select the desired language.

Option	Definition
Enable Multiple Languages	• **Enabled**: Supports more than the default language in the message. • **Disabled**: Only supports the default language in the message. **Note:** If your browser default language is not a configured language within Web Messenger, the default language is the first language you have selected to configure.
Default to the users browser locale (if possible)	• **Enabled**: Identifies the language of the user based on location and defaults to that language, if possible. • **Disabled**: Does not allow the browser to default to a language based on the user's location.
Allow user to select unconfigured language	• **Enabled**: The user can choose to engage through the message in a language not yet configured. • **Disabled**: Only allows the user to engage in configured languages. **Note:** When this option is enabled, a user will see the option + More in the messenger to view additional languages that are not configured. Real-time translation will still translate messages to and from the user and the agent, but all labels and UI localization will be in English. The list of languages in the widget is organized by configured languages at the top, followed by additional languages supported by Google Translate in alphabetical order.
Language menu (Gray text box)	A list of languages you can configure for your messenger.

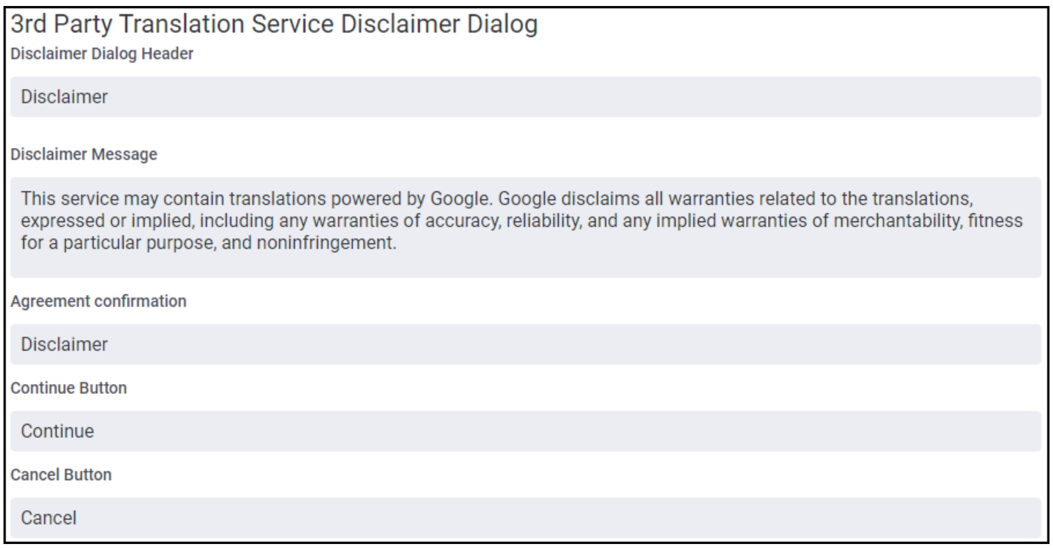
Option	Definition
	 Enter the name of the language you want to add. 
Settings for language code [language abbreviation]	
Use [language abbreviation] as the default language	• **Enabled**: Indicates the selected language is the default. • **Disabled**: Indicates the selected language is not the default.
Is [language abbreviation] a "preferred" language meaning it shows up in the first listing	• **Enabled**: Indicates if the selected language will appear first in the list of languages, as a preferred language. • **Disabled**: Indicates the selected language will not necessarily appear first in the list of languages, as it is not a preferred language.
Show a disclaimer message to the user before selecting language?	• **Enabled**: The system shows a disclaimer message before the user can select a language. • **Disabled**: The system does not show a disclaimer message before the user can select a language.

When configuring a language other than English, select the desired language from the Current Language drop-down list.

> **Note**
>
> None of the text on the Web Messenger configuration screen will translate from English. Translation is specifically for the message(s) to and from the user.



If you enable the 3rd Party Translation Service Disclaimer Dialog, the following five gray text boxes will appear.

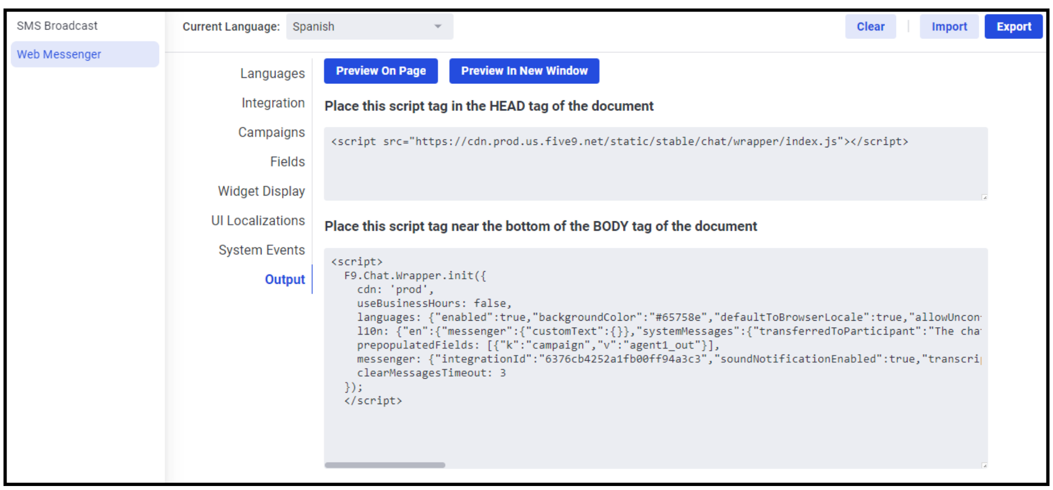


Option	Definition
Disclaimer Dialog Header	The title of the disclaimer message.
Disclaimer Message	The body text of the disclaimer message.
Agreement confirmation	The agreement confirmation text.
Continue Button	The label of the button to click to continue the message.
Cancel Button	The label of the button to click to cancel the message.

Configuring the UI Localizations Tab for Real Time Translation

When the user selects Español when they start the message, they only see prompts and responses in Spanish if those have been configured on this tab. To ensure all prompts and responses to the user show in the language they selected, complete the translation for each prompt here. If one or more of these options is not configured for the selected language, the text defaults to English. See Configuring UI Localizations for more information.

Real Time Translation in the Messenger Window



Use case for user selecting Spanish

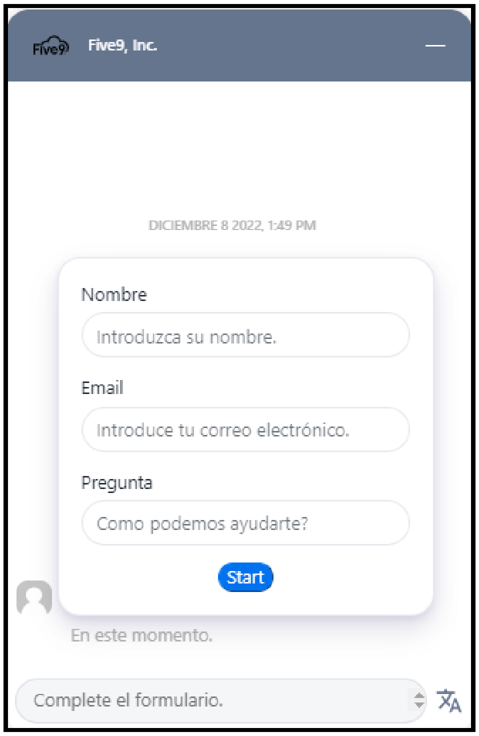
To test the real time translation from the end-user perspective:

1 Click Preview on Page.
The messenger widget appears.

2 Click the widget to start the conversation.
The conversation opens and prompts you to select a language.

3 Click Español.
The row turns blue and a blue checked box appears.

4 Click Continue.
The widget prompts you to complete the fields.

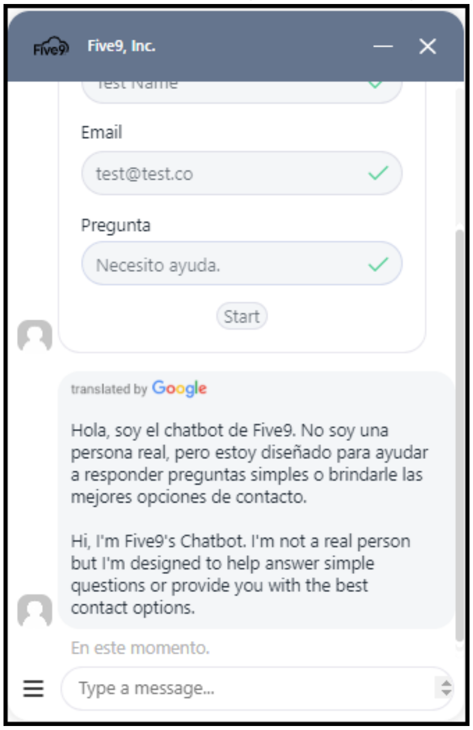


Note

If the UI Localizations fields are edited for the selected language, they automatically populate in that language. For instance, the prompts are in Spanish. However, the pre-chat capture form is populated from Labels on the Fields tab.

5 Enter a name (Nombre), email address (Email), and question (Pregunta).

6 Click Start.
You receive a message from the agent in English and Spanish (the translation).



7 (Optional) If you have Digital IVA configured, several tiles may appear to route the user to the correct agent. Click a tile to select that option.
The option you clicked appears as plain text in the message and you receive another translated response.

> **Important**
> Text included in rich controls sent from Digital IVA will not be translated.

8 The message is then sent to the agent in Agent Desktop Plus.

Web Messenger Variables

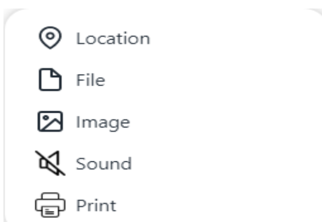
The TranslationSourceLanguageCode variable tells Five9 to translate chat messages from the agent's default language, English, to the customer's selected language.

When the customer starts a chat, they select their preferred language, which the system stores in this CAV. The system translates incoming messages from the customer's language (e.g., French) to English for the agent. It then translates the agent's responses from English back into the customer's language. This CAV determines the target language for all translations.

Test Web Messenger in the Widget

You can test web messenger functionality in the widget using the Output tab. When you launch the Web Messenger widget, a capture form appears to collect information before the conversation is initiated. You can customize the capture form on the Fields tab. For more information, see **Configuring Fields Options**.

If you enable Allow Share Location, Enable file uploads, Enable Sound Notifications, or enable Print, they appear in the hamburger menu to the left of the Type a message text box.

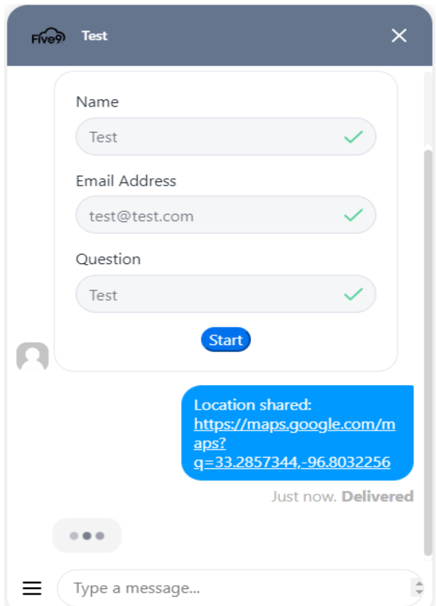


Using location

To provide your location:

1. Click the menu .
2. Click **Location**.
   Your browser may prompt you to give permission to share your location.
   If you have approved permission, a Google Maps location URL is shared in the

chat.

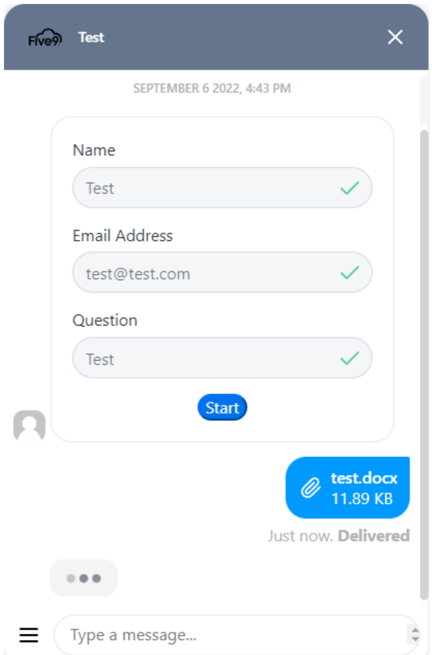


Attaching a File

To attach a file to your chat:

1. Click the hamburger menu.
2. Click **File**.
   A file explorer appears.
3. Navigate to and select the file you want to attach.

The file name will appear as an attachment in the chat.



See Web Messenger attachments for information on supported file types.

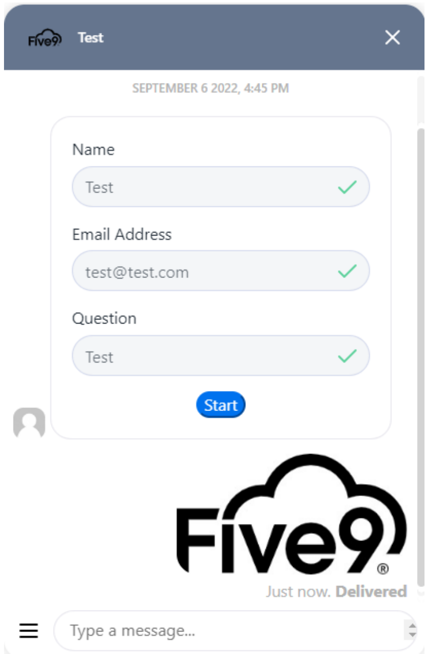
Attaching an Image

To attach an image to your chat:

1 Click the menu .

2 Click **Image**.
A file explorer appears.

3 Navigate to and select the file you want to attach.
The file name will appear as an attachment in the chat.



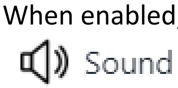
See [Web Messenger attachments] for information on supported file types.

Enabling an Audible Notification

To hear a notification sound:

1 Click the menu .

2 Toggle Sound to enable or disable this feature.
When enabled, the speaker appears with reverberations.



When disabled, the speaker appears with a line through it.

Printing Chat Conversation

To print the chat conversation:

1 Click the menu .

2 Click **Print**.
The browser print settings window appears.

3 Click **Print**.
The content from your chat conversation prints.

Supported Attachment File Types in Web Messenger

The most widely supported attachment types are jpeg, png, and gif images. Five9 accepts attachment content types (detected server-side) shown in the list below. File size must not exceed 5 MB.

- Five9 only supports file names with lowercase and uppercase ASCII letters, decimal digits, "!", "*", "+", "-", "/", "=", and "_".
- An agent can only send an attachment if they have the **Agent can send messaging attachment** permission.

Extension	File Type
.7z	application/x-7z-compressed
.bz2	application/x-bzip2
.csv	application/csv
.doc, .docx	application/msword, vnd.openxmlformats-officedocument.wordprocessingml.document
.gz	application/gzip, x-gzip
.js	applicaiton/javascript
.json	application/json
.mdk, .mdf, .mdb, .mdp	application/octet-stream
.numbers	application/apple.numbers
.odt	application/oasis.opendocument.text
.ogv, .oga, .ogx, .ogg,	application/ogg
.pages	application/vnd.apple.pages
.pdf	application/pdf
.ppsx	application/vnd.openxmlformats-office-document.presentationml.slideshow
.ppt, .pptx, .pptm,	application/vnd.ms-powerpoint, vnd.openxmlformats-officedocument.presentationml.presentation
.rtf	application/rtf

Extension	File Type
.smil	application/smil
.tar	application/x-tar
x-yaml	applicaiton/x-yaml
.xls, .xlsb, .xlsm, .xlsx	application/vnd.ms-excel, vnd.openxmlformats-officedocument.spreadsheetml.sheet
.xml	application/xml
.zip	application/zip
.3gp	audio/3gpp
.3gpp2	audio/3gpp2
.aac	audio/aac
.ac3	audio/ac3
.adts	audio/x-hx-aac-adts
.amr, .3ga	audio/amr
.flac	audio/flac
.m4a, .m4p, .m4b, .m4r, .x-m4a,	audio/mp4
.mp1, .mp2, .mp3, .m1a, .m2a, .mpa. .	audio/mpeg
.oga	audio/ogg
.wav	audio/wav
.webm	audio/webm
.x-wav	audio/x-wav
.bmp, .dib, .x-ms-bmp	image/bmp
.gif	image/gif
.heic	image/heic
.ico	image/x-icon
.jpg, .jpeg	image/jpeg
.pjpeg	image/pjpeg
.png	image/png
.svg	image/svg+xml
.tiff, .tif	image/tiff

Extension	File Type
.webp	image/webp
.eml	message/rfc822
.css	text/css
.csv	text/csv
.html	text/html
.ics	text/calendar
.js	text/javascript
.txt	text/plain
.vcf, .vcard	text/vcard
.wap, .wml	text/wap.wml
.xml	text/xml
.yml, .yaml	text/x-yaml
.3gp	video/3gpp
.3gpp2	video/3gpp2
.avi	video/avi, x-msvideo
.flv	video/x-flv
.mov.qt	video/quicktime
.mp4, .x-m4v	video/mp4
.mpg, .mpeg, .m1v, .mpv	video/mpeg
.ogv, .ogx, .ogg, .spx, .ogm	video/ogg
.webm	video/webm
.wmv	video/x-ms-wmv
.wma, .wmv	video/x-ms-asf

Note

There are only a few file types that Five9 does not support as attachments. If a file type is not listed above, it is not yet supported.

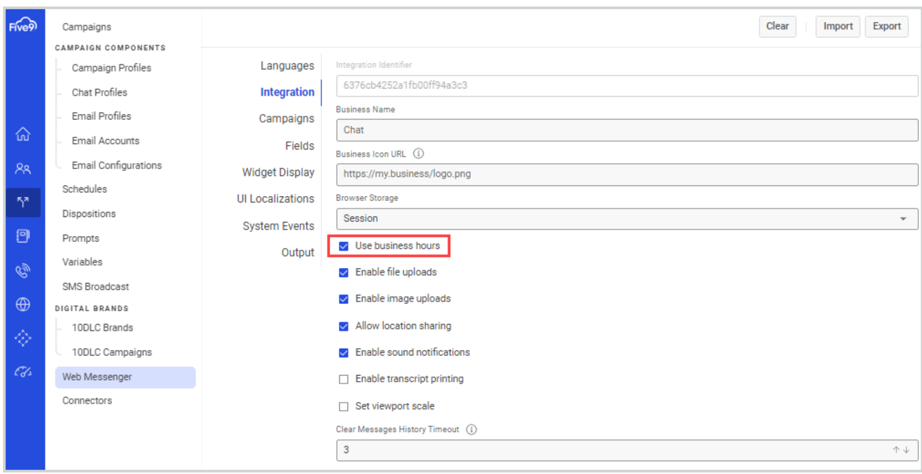
After Hours Email

Users may require assistance outside of regular business hours. To ensure continuous support, we offer an after-hours email option for chat inquiries. This feature allows users to reach out to our support team via email when live chat support is unavailable.

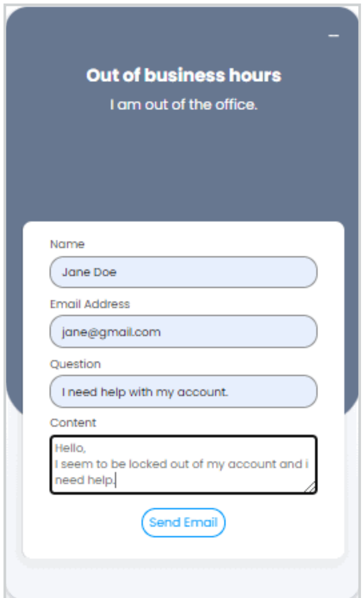
Enabling the After Hours Email

To enable the after hours email option:

1. Navigate to Web Messenger and select **Integration**.
2. Select **Use business hours**.



When the chat is initiated, the user will be directed to a form where they can submit their inquiry or issue.

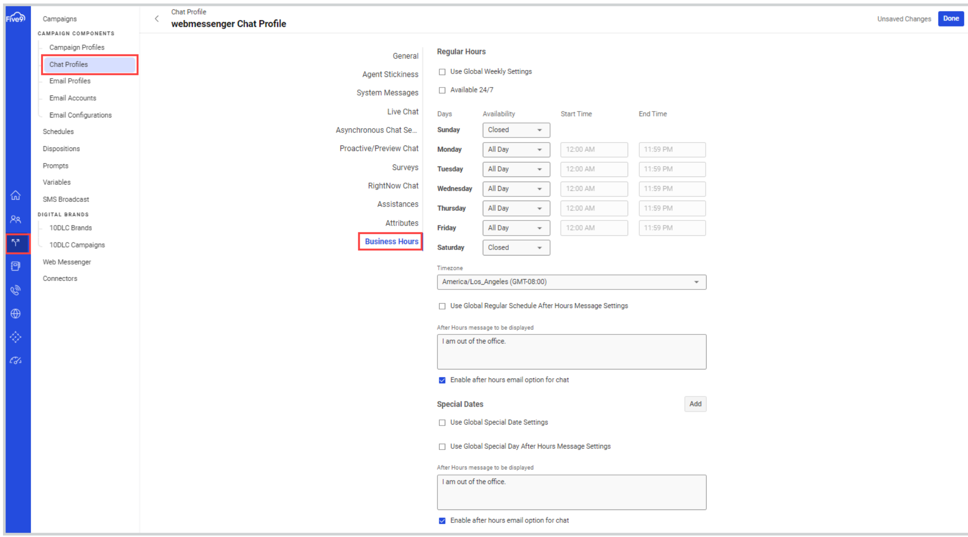


Customizing the After Hours Email

You can customize the business days, hours, and message to be displayed within the chat using the Business Hours feature in Manage Campaigns.

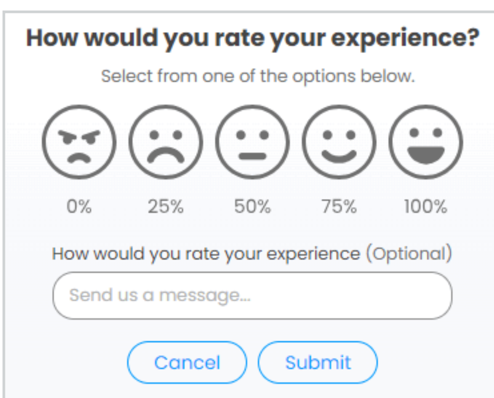
To customize the after hours email:

1. Navigate to **Manage Campaigns > Chat Profiles > Business Hours**.
2. Modify the desired fields and set your Timezone.



Post Chat Survey

This survey serves as a direct channel for users to provide feedback on their experience. After concluding a chat session with our team, users are prompted to participate in the survey. Users are asked to rate their experience, allowing us to gather invaluable feedback for identifying areas of improvement.



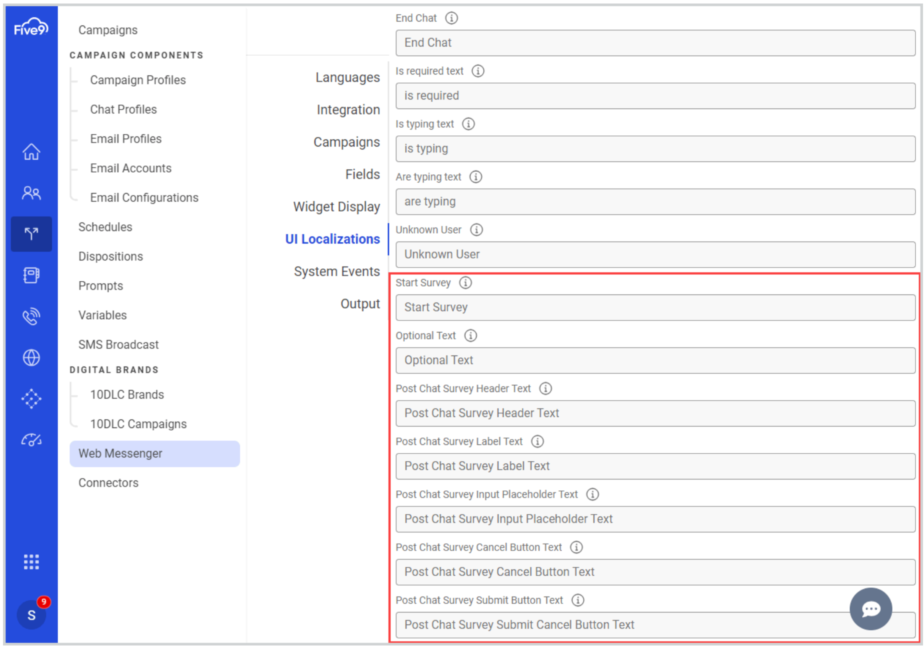
Customizing the Post Chat Survey

You can customize the text fields within the Post Chat Survey using the UI Localizations feature in Web Messenger.

To make adjustments:

1 Navigate to Web Messenger and select **UI Localizations**.

2 Scroll down to the Start Survey section and modify the desired text fields.



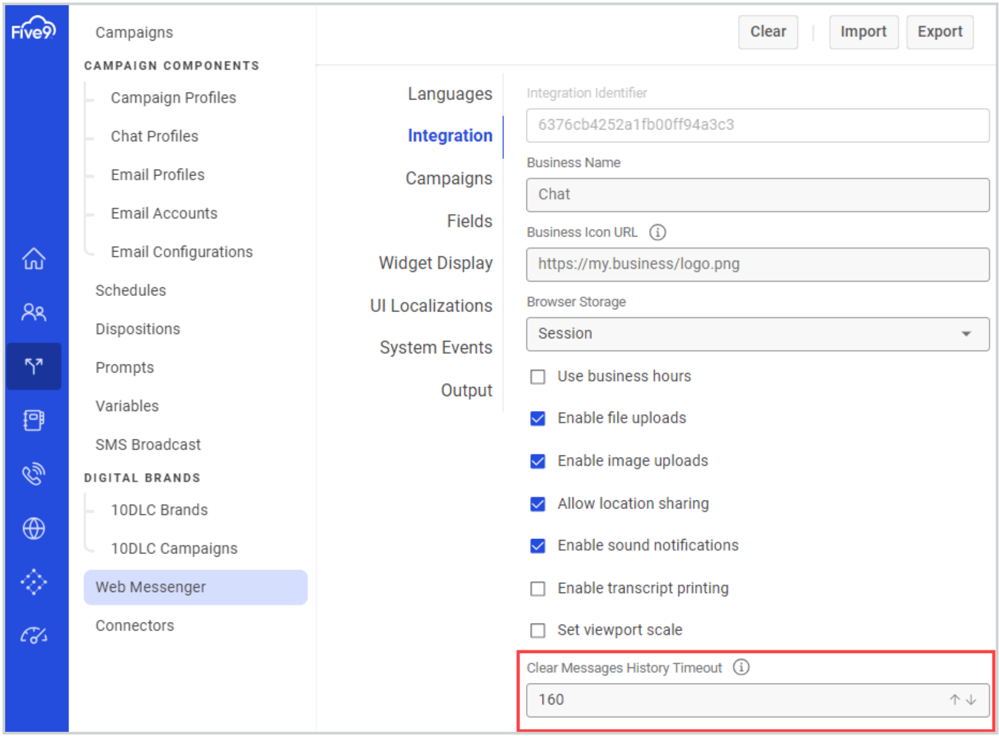
Clear Messages History Timeout

The survey can also be initiated directly from the header if the History Timeout has been extended beyond the default duration.

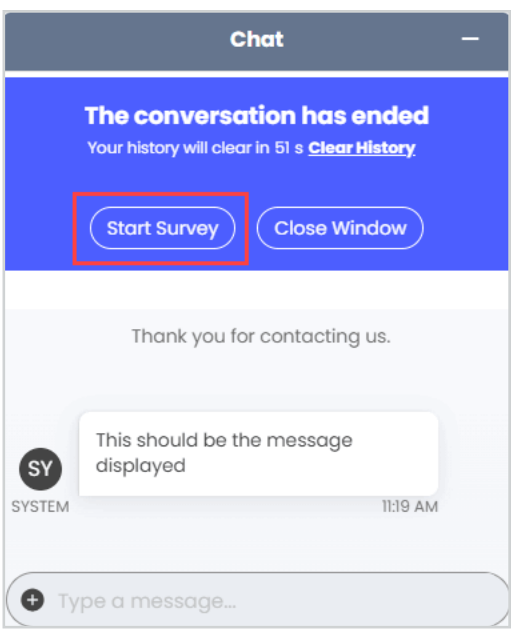
To initiate the survey from the header:

1 Navigate to Web Messenger and select **Integration**.

2 In the Clear Messages History Timeout field, enter a higher value to extend the duration beyond the default setting.



Users can now initiate the survey directly from the header.



The system stores the survey results in SCC, where you can view them in SCC reports.

Cards and Carousels

Use cards and carousels to display messages with text, media, and buttons. Each card can show a title, message, media (image or video), and up to five buttons. You can display multiple cards in a carousel for easy navigation.

> **Note**
> Cards and carousels are supported only through self-service flows in Studio.

Card Format

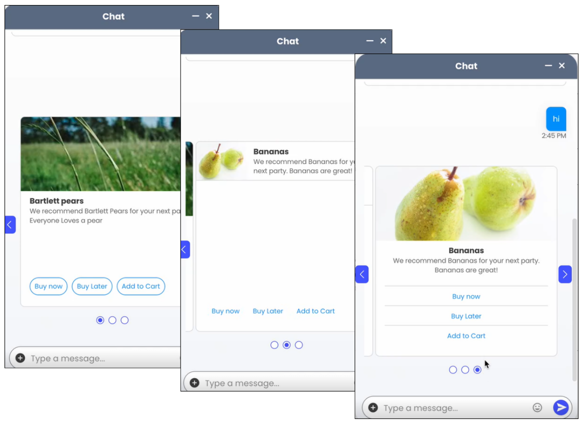
Each card consists of the following elements:

- **Title:** Enter static text or use variables by typing two curly brackets **{{** and selecting from available options.
- **Message Content:** Enter the message or use variables for dynamic content. Messages can be formatted using Markdown.
- **Media:** Add images or videos to enhance your card's content.
- **Buttons:** Add up to five buttons. These buttons can trigger actions such as routing to other nodes.

Card Types

Card Type	Description
Text	Displays only text.
Image	Displays text and an image.
Video	Displays text and a video.

Card Layout Styles



Style	Description
Default	Displays the media (if any) at the top, followed by the title, message, and buttons in a row.
Horizontal	Displays the media to the top-left, and the title and message to the top-right. Buttons appear in a row.
Stacked	Displays the media, title, message, and buttons stacked vertically.

Media Upload or URL

When using Image or Video cards, you can upload media or provide a URL:

- **Upload:** Drag and drop supported file formats (JPG, PNG for images, MP4 for video). Image files must be under 2MB, and video files must be under 20MB.

- **URL:** Enter the media URL or use a variable by typing {{ and selecting an option.

Buttons

Add buttons to your card with the following options:

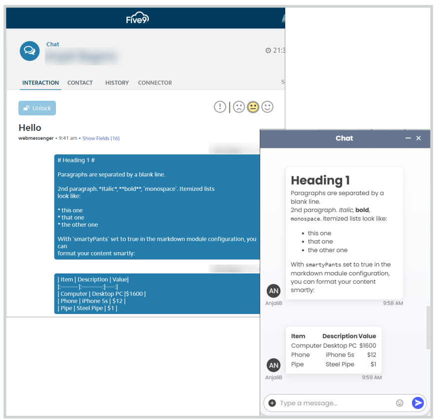
Option	Description
Button Text	Enter button label text or use a variable for dynamic text.
Goto Node	Define the node that the conversation routes to when the button is selected.

Markdown

Five9's chat platform supports Markdown for formatting messages. When sending messages, use the following Markdown syntax to enhance text formatting.

<table>
<tr><th>Format</th><th>Syntax Example</th><th>Result</th></tr>
<tr><td>Heading 1</td><td>#Heading 1#</td><td>Heading 1 text</td></tr>
<tr><td>Bold</td><td><code>**bold text**</code></td><td>bold text</td></tr>
<tr><td>Italics</td><td><code>*italic text*</code></td><td>italic text</td></tr>
<tr><td>Underline</td><td><code><u>underlined text</u></code></td><td>underlined text</td></tr>
<tr><td>Monospace</td><td><code>'monospace'</code></td><td><code>monospace text</code></td></tr>
<tr><td>Ordered List</td><td><code>1.First item
2.First item
3.First item</code></td><td>1. First item
2. Second item
3. Third item
Note: When rendered, the text starts three characters in from the left (see Example below).</td></tr>
<tr><td>Unordered List</td><td><code>*First item
*Second item
*Third item</code></td><td>• First item
• Second item
• Third item
Note: When rendered, the text starts three characters in from the left (see Example below).</td></tr>
<tr><td>Link</td><td><code>[link text]
(http://example.com)</code></td><td>link text</td></tr>
<tr><td>Table</td><td><code>| Item	Description	Value
Computer	Desktop PC	$1600
Phone	iPhone 5s	$12
Pipe	Steel Pipe	$1 |</code></td><td><table><tr><th>Item</th><th>Description</th><th>Value</th></tr><tr><td>Computer</td><td>Desktop PC</td><td>$1600</td></tr><tr><td>Phone</td><td>iPhone 5s</td><td>$12</td></tr><tr><td>Pipe</td><td>Steel Pipe</td><td>$1</td></tr></table></td></tr>
</table>

Example



Custom CSS Support

Advanced Chat uses a low-specificity CSS architecture to enable flexible and efficient customization.

The Custom CSS feature allows customers to override existing styles in Advanced Chat by providing a custom CSS stylesheet. To ensure the customer-defined styles take precedence, the CSS selectors in the custom stylesheet must have higher specificity than those in the default styles. This approach minimizes the risk of style conflicts or accidental overrides while enabling seamless customization.

Enable Custom CSS

Follow these steps to enable Custom CSS in Advanced Chat:

1 Prepare the `custom.css` File

Create a `custom.css` file and ensure it is served over HTTP or HTTPS. Use specific selectors to override existing styles.

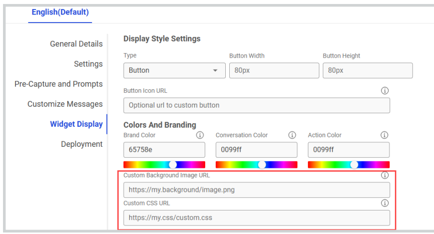
Example

The duplicated `.pn-msg-input__wrapper` class increases specificity, allowing the default style to be overridden:

```
.root .pn-msg-input__wrapper.pn-msg-input__wrapper {
border-radius: 6px;
}
```

2 Configure the Application

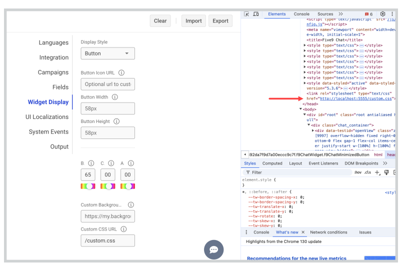
Use the Admin Configurator to set up the application.



The URL for the custom CSS can be an absolute path (e.g., `https://example.com/custom.css`) or a relative path (e.g., `/custom.css`). When using a relative path, Advanced Chat assumes the stylesheet is served from the parent domain and automatically prefixes it with the parent's origin.

Example

In the following example, `localhost:5555` is the parent origin that serves the `custom.css`:



Configuring Chat in SCC

The SCC Administrator application enables configuration of Chat options.

Configuring Chat Routing and Abandon Options
Configuring Chat Inactivity Options
Configuring Chat Settings and Transcript Options
Configuring Business Hours of Operation
Configuring the No Service After-Hours Message
Configuring Profiles to Support Proactive and Preview Chat
Sending Chat Transcripts to the Chat Customer
Returning Unanswered Chat Interactions to the Media Queue
Defining Automated Messages for Chat Engagements

Configuring Chat Routing and Abandon Options

In **Profiles > Chat**, you can define the behavior of web chat and asynchronous messages when they are received after business hours and when no agents are logged into the system. Enabling each routing setting below allows you to define the system message that is displayed to the corresponding setting.

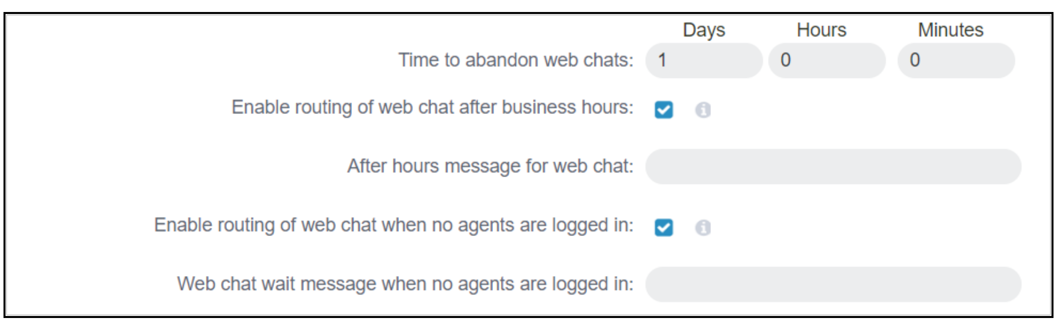
Configuring Routing of Web Chats

If you select the **Enable routing of web chat after business hours:** option, web chats received outside of business hours are routed as usual. If you enable this setting, you may also define the **After hours message for web chat**.

If you select the **Enable routing of web chat when no agents are logged in:** option and routing after business hours is not enabled, web chats are routed as usual even if no agents are logged in and active. If you enable this setting, you may also define the **Web chat wait message when no agents are logged in**.

Set the **Time to abandon web chats:** in **Days**, **Hours** and **Minutes** that you want Five9 to abandon a still-open web chat that is unassigned. By default, web chats are abandoned after 1 day (24 hours), but you can keep them up to 7 days (168 hours). The system displays a warning message if you set a time less than 30 minutes or more than 7 days.

Five9 also abandons native chats automatically if the end-user chat client disconnects and the end-user does not re-connect within approximately three minutes.



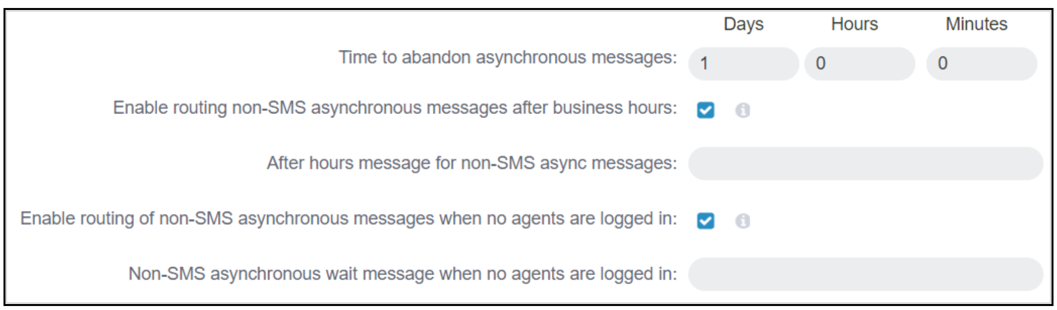
Configuring Routing of Asynchronous Messages

If you select the **Enable routing of non-SMS asynchronous messages after business hours:** option, non-SMS asynchronous messages received outside of business hours are routed as usual. If you enable this setting, you may also define the .**After hours message for non-SMS asynchronous messages**.

If you select the **Enable routing of non-SMS asynchronous messages when no agents are logged in:** option and routing after business hours is not enabled, non-SMS asynchronous messages are routed as usual even if no agents are logged in and active. If you enable this setting, you may also define the **Non-SMS asynchronous wait message when no agents are logged in**.

Set the **Time to abandon asynchronous messages:** in **Days**, **Hours** and **Minutes** that you want Five9 to abandon a still-open chat that is unassigned. By default, non-SMS asynchronous messages are abandoned after 7 days, but you can set the time to keep them less than 7 days. The system displays a warning message if you set a time less than 30 minutes or more than 7 days.

Asynchronous messages are created by the Five9 messaging API. **Time to abandon asynchronous messages:** applies to messages created with any sub-media type except "GENERIC". If the message sub-media type is "GENERIC", then the **Time to abandon web chats:** configuration applies.



Note

If an inbound web chat or asynchronous message is transferred to another campaign, the time to abandon and business hour settings of the originating campaign persist.

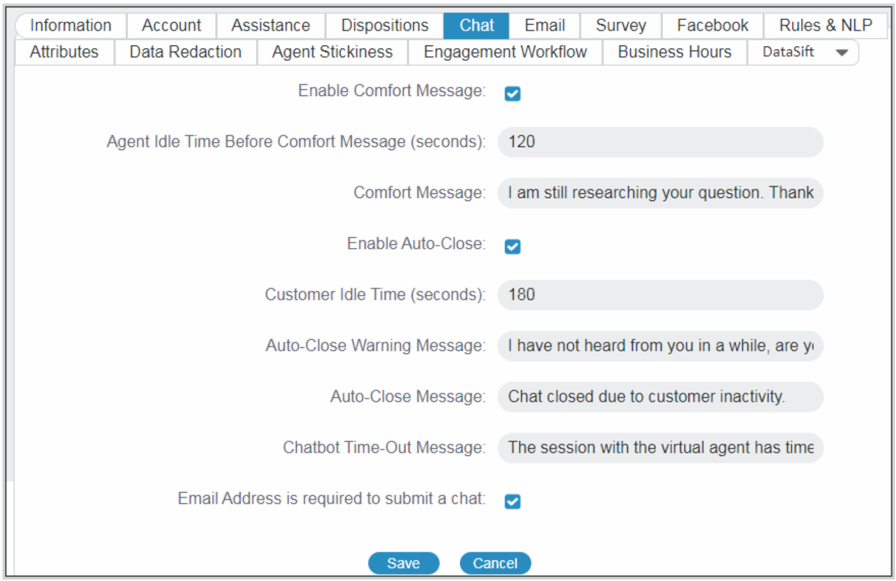
Configuring Chat Inactivity Options

Enabling Automated Reminder (Comfort) Messages

In **Profiles > Chat**, you can define the automated comfort messages displayed to a contact if the agent is taking too long to reply. The timer begins when the customer responds and restarts when the agent sends a message. Similarly, inactivity by the contact can start an option to automatically close the chat window.

Note

The customer-idle time restarts when a chat interaction is transferred to another agent.



Important

If you use the agent-idle timer and the automatic close option you can potentially send confusing messages to your customers. You must carefully plan the timing of your agent-idle timer messages and the close inactive interaction timer to avoid these situations.

Example

In this scenario, the agent idle timer is configured for 30 seconds and an automatic close timer configured for 180 seconds. If agents are unresponsive, you can produce a confusing interaction for your customers, as outlined below:

- The agent is busy. A comfort message is sent at 30th, 60th, and 90th second saying `I am still researching your ...`
- At the same time, at the 90th second, a warning is displayed to the customer: `I have not heard from you for a while...`
- Now the customer is confused. The customer has nothing to say because the agent is still researching. So the customer waits.
- At 120th and 150th second intervals, additional comfort messages are displayed to the customer: `I am still researching your…` because

> the agent is still busy or unresponsive.
>
> - At the 180th second the chat is automatically closed due to inactivity.

No timer setting is generic for all because every contact center is different. You must carefully balance the timing of your messages with the responsiveness and task load of your agents. If your agents typically respond to chat interactions within 30 seconds, the scenario described above presents no problem or confusion to your customers. They would never receive the agent-idle comfort messages. Once an agent initially responds to the chat, the agent-idle timer is turned off and the customer no longer receives agent-idle comfort messages.

Configuring the Reminder Message

The reminder message is disabled by default. To configure the reminder message, follow these steps.

1. To enable this feature, select the **Enable Comfort Message** option.

2. Configure the agent-idle time interval.

   You can configure a time interval from 30 to 600 seconds (default is 120 seconds). Any text entry in the chat by the agent resets this timer. With no agent activity this message is sent at the defined interval.

3. Enable the **Comfort message** option and define a message containing up to 2,000 characters.

   The default comfort message is `I am still researching. Thanks for the patience`. If you enable this option, you must define a comfort message.

Closing the Chat Window Automatically

The chat automatic close feature is disabled by default. To configure automatic close for inactive chat sessions, follow these steps.

1. Select the **Enable Auto-Close** option.

2. Set an inactivity time limit.

   You can configure any time from 30 to 600 seconds. The default time to automatically close an inactive interaction is 180 seconds.

3. Configure the auto-close warning message.

The default message is `I haven't heard from you in a while. Are you still there?` You can define any message containing up to 2,000 characters.

The automatic close warnings displays when one half of your customer idle timer has passed. The idle timer restarts with any new text entry from the customer.

4 Configure your automatic close message.

The default message is `Chat auto-closed due to customer inactivity`. You can define any message up to 2,000 characters. If you enable this option, you must define automatic close warning and automatic close timer settings.

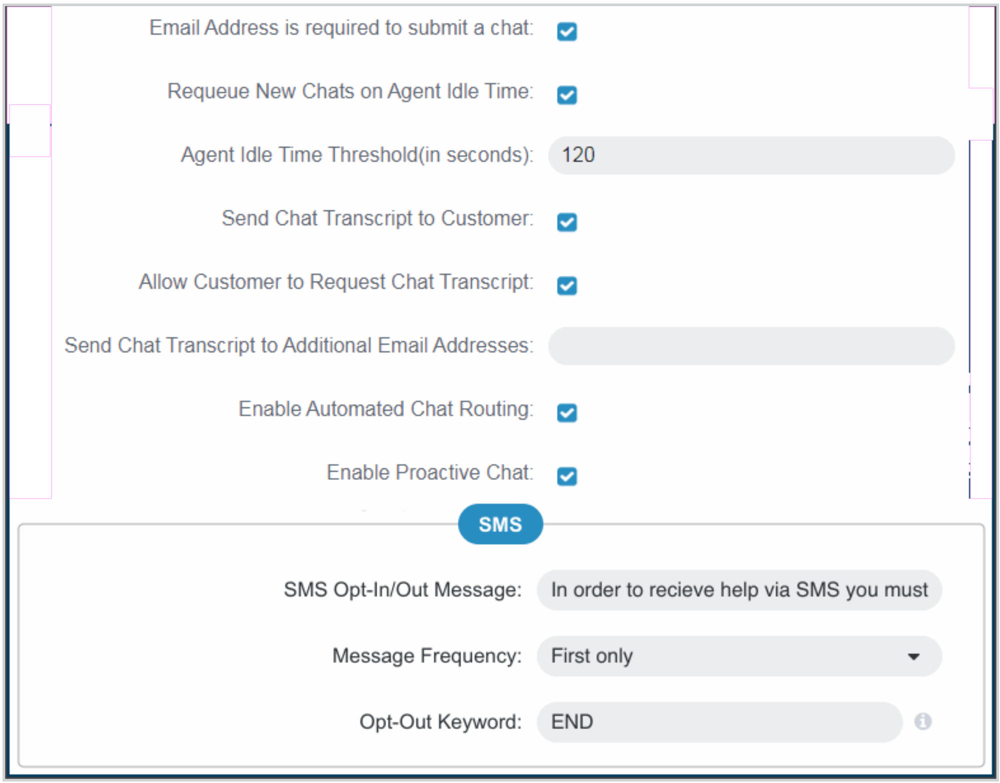
No timer setting is generic for all because every contact center is different. You must carefully balance the timing of your messages with the responsiveness and task load of your agents. If your agents typically respond to chat interactions within 30 seconds, the scenario described above presents no problems or confusion to your customers, they would never receive the agent-idle comfort messages.

5 Configure your chatbot automatic close message.

The default message is `The session with the virtual agent has timed out. To continue the conversation, start another session`. You can define any message up to 2,000 characters. If you enable this option, you must define automatic close warning and automatic close timer settings.

Configuring Chat Settings and Transcript Options

In **Profiles > Chat** you can configure the chat presentation options, such as email required and queuing options, and also define your transcript and Proactive Chat options.



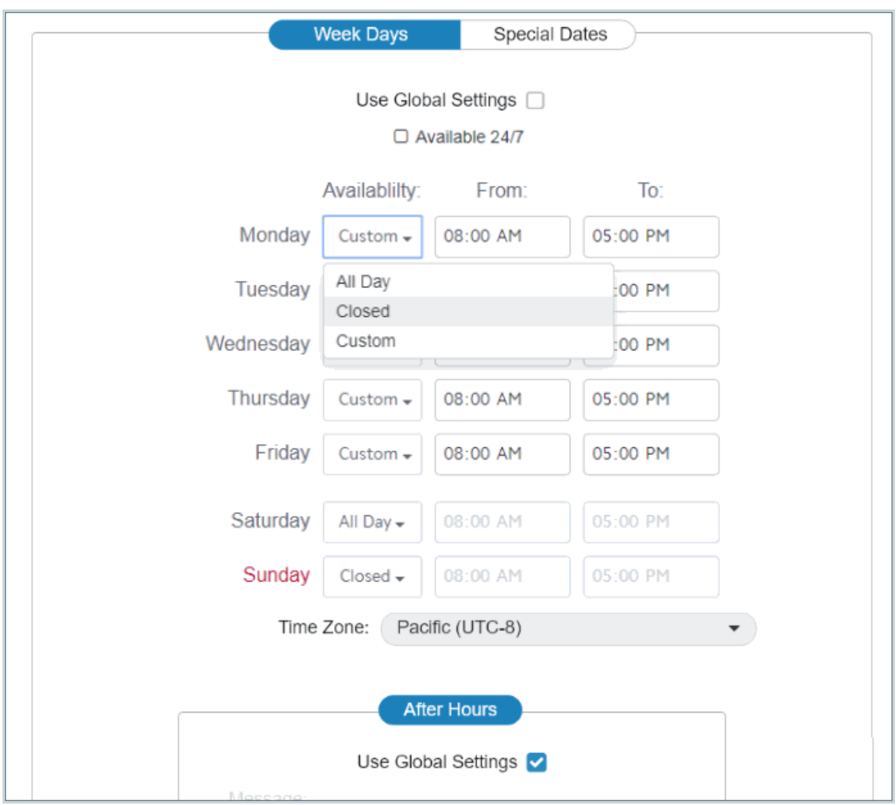
Option	Definition
Messaging bot time-out message	Outbound message sent to contact after the virtual agent engagement timer has expired. To see this option, your domain must be enabled for the Five9 messaging bot.
Email address is required to submit a chat	• **Enabled**: Email address is required to submit a chat. • **Disabled**: Email address is not required to submit a chat. The email field is still provided but not required to be filled in.
Re-queue new chats on agent idle time	• **Enabled**: Chat interaction is re-queued when agent-idle time threshold is exceeded. • **Disabled**: Chat interaction remains assigned to the agent without regard to agent-idle time threshold.
Agent idle time threshold (in	If Re-queue new chats on agent-idle time is enabled,

<table>
<tr><th>Option</th><th>Definition</th></tr>
<tr><td>seconds)</td><td>this threshold is used to re-queue a chat if the agent did not send a reply to the customer. If the agent sent any reply, the interaction stays with the agent.</td></tr>
<tr><td>Send chat transcript to customer</td><td>Enabled: Chat transcript is sent to customer using the email provided by the customer.
Disabled: Chat transcript option is not available to customer.
Important: Outgoing email settings must be configured to send transcript.</td></tr>
<tr><td>Send chat transcript to additional email addresses</td><td>Identify additional email addresses for chat transcript here. Multiple addresses must be separated by semicolons.</td></tr>
<tr><td>Allow customer to request chat transcript</td><td>Enabled: Customer can request chat transcript within the chat interface. This is independent from the send chat transcript to customer option but will not send duplicate email transcripts.
Disabled: Chat transcript option is not available to customer within the chat interface.
Important: Outgoing email settings must be configured to send transcript.</td></tr>
<tr><td>Enable Automated Chat Routing</td><td>Enables chatbot routing.</td></tr>
<tr><td>Enable Proactive Chat</td><td>Enables Proactive Chat. To configure Proactive Chat, see Configuring Profiles to Support Proactive and Preview Chat.</td></tr>
<tr><td>SMS Opt-In/Out Message
This option displays only for campaigns with SMS-enabled phone numbers associated.</td><td>SMS opt-in/out message displayed for SMS campaigns. This field may contain up to 160 characters.
Default: Reply STOP to stop receiving messages</td></tr>
<tr><td>Message Frequency
This option displays only for campaigns with SMS-enabled phone numbers associated.</td><td>Frequency to display SMS Opt-In/Out message.
Never: Opt-In/Out message keyword is delivered as is without processing.
First only: Opt-In/Out message keyword is included with the first message only for this chat</td></tr>
</table>

Option	Definition
	conversation, the chat is stopped and the record is removed from the opt-in list. • **Every time**: Opt-In/Out message keyword is included with every message in the chat conversation, the chat is stopped and the record is removed from the opt-in list.
Opt-Out Keyword This option displays only for campaigns with SMS-enabled phone numbers associated.	Customer replies with this keyword to be removed from the opt-in list. This field is required when message frequency is **first only** or **every time**. Default: **STOP**

Configuring Business Hours of Operation

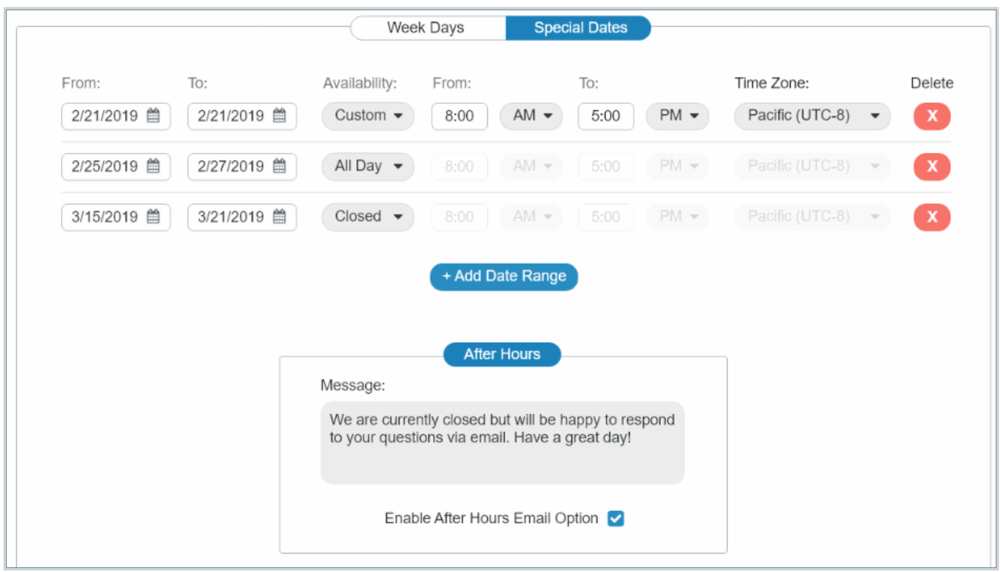
In **Profiles > Business Hours**, you can define your chat hours of operation to include an after-hours message (see **Configuring the No Service After-Hours Message**) and also wait message when agents are unavailable. You can enable customers to submit an email outside of the chat business hours through your chat console.



To define special dates, such as holidays, click **Special Dates**. You can add multiple special date ranges and delete these individually.

You can configure unique after-hours messages for Weekdays, Special Dates, and Global Settings. Special Dates always supersede pre-defined business hours for weekdays that share the same schedule. Similarly, special messages supersede standard messages when the special dates/hours are defined for the same period.

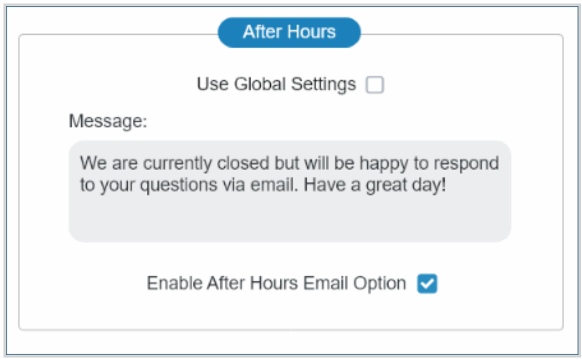
Standard business days and/or hours can be created in a single time zone, such as your domain time zone, for all seven days. You can define special days, such as holidays, using a specific time zone for each special day definition.



To use global settings that are defined for your domain Global Settings tab, click **Use Global Settings**. By default, the global settings hours are configured to fully open, or all day every day. If no custom message is defined in the Global Settings tab, the After Hours message in the Business Hours tab is shown.

Configuring the *No Service After-Hours* Message

You can define after hours messages globally, in Global Settings, or uniquely for each profile within your domain. To configure a message, specific to a profile, to communicate that there is no service outside of your defined business hours, enter your message into the **After Hours Message** text box. If no message is configured in your profile Business Hours tab, the after hours message defined in the Global Settings tab is shown.



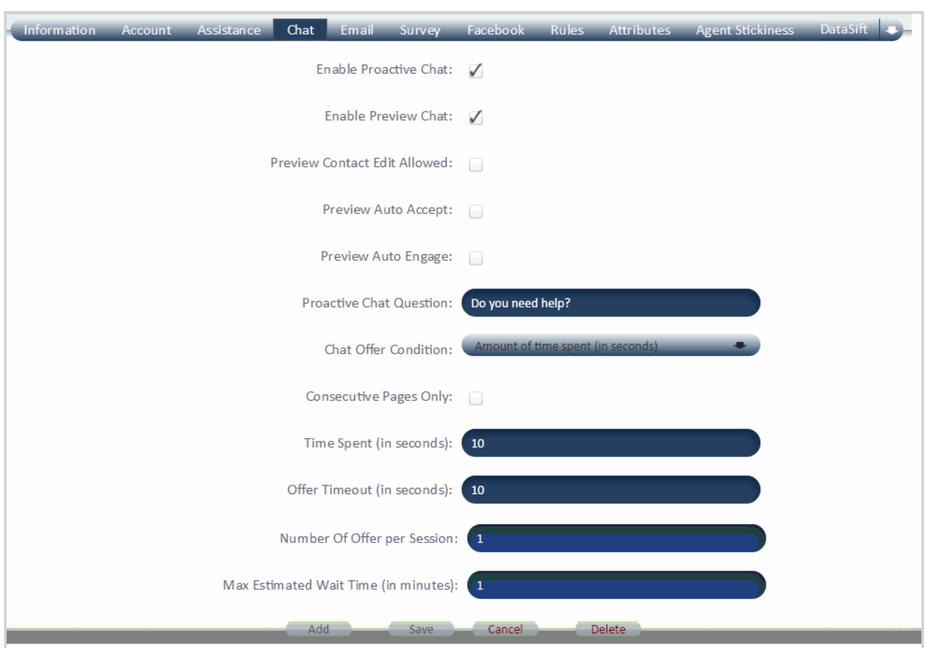
To enable after hours email submission, click **Enable After Hours Email Option**.

Configuring Profiles to Support Proactive and Preview Chat

You can use a combination of preview and proactive chat for your agents if the chats are added to different profiles in the Digital Engagement Administrator application. To configure multiple chat profiles, follow these steps:

1. Create different profiles to support each chat type.

   The chat interaction enters the media queue and is routed to the next available agent according to the business rules that you have defined for chat interactions.



2 Define the parameters that determine when the prompt is presented to the visitor:

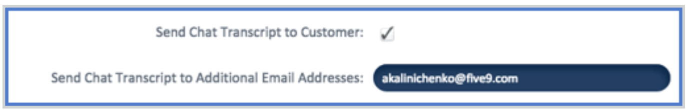
Enable Proactive Chat	Enables proactive chat at your web site.
Enable Preview Chat	Enables preview chat at your web site.
Preview Contact Edit Allowed	Enables customers to enter or edit their contact information before they submit the chat request. Use cautiously because every additional step you ask a customer to take makes it less likely they ultimately engage with your agent.
Preview Auto Accept	Enables preview chats to be automatically accepted by agents.
Preview Auto Engage	Enables preview chats to be automatically engaged by agents. When agents are assigned preview chats, either by locking or by accepting automatically, a connection to the agent waiting to chat is displayed to the customer. The default message displayed to the customer is the message configured for proactive chat.
Proactive Chat Question	Question that your visitor sees in the proactive chat prompt.
Chat Offer Condition	Condition that prompts the chat offer.
Consecutive Pages Only	Whether the chat is offered only after the customer looks at consecutive web pages.

These options are specific to triggering a proactive chat:

Time Spent (in seconds)	Number of seconds (mouse hover time) before extending a proactive chat offer.
Offer Timeout (in seconds)	Number of seconds before the chat offer expires.
Number of Pages	Number of pages visited before the chat prompt is displayed.
Offer Timeout	Number of seconds before the chat prompt disappears.
Number of Offers Per Session	Number of offers a visitor can receive during a single session at your web site.
Max Estimated Wait Time	Maximum number of minutes for the chat customer to wait for an agent.

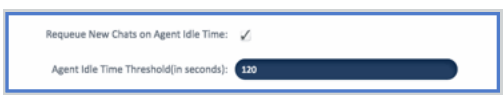
Sending Chat Transcripts to the Chat Customer

The chat transcript, including transfers, are sent to the customer when a disposition is set for the interaction. Enter a comma-separated list of email addresses that should receive the transcripts. Supervisors may also want to receive chat transcripts. This feature is disabled by default. Chat transcripts, single messages, and comment fields in surveys are limited to 1024 characters. The limit for an entire chat conversation, email thread, or social thread is 16.7MB. Attachment limits are separate and vary by provider.



Returning Unanswered Chat Interactions to the Media Queue

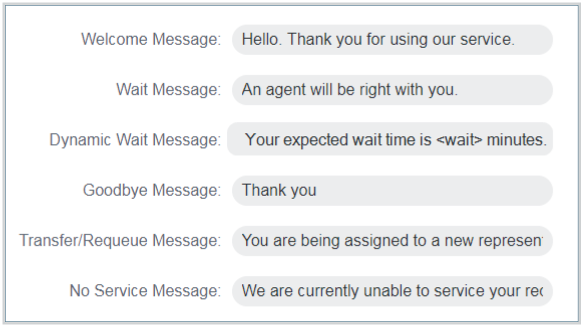
Return unanswered chat interactions to the media queue if an agent has not responded within the specified time limit. This feature is off by default. To use it, enable the feature and set the threshold. The default is 120 seconds.



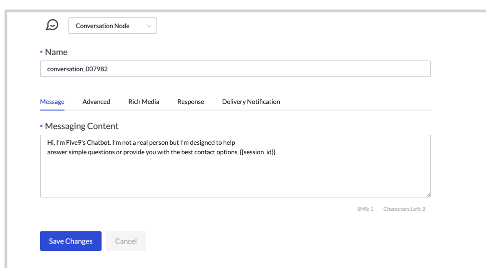
Defining Automated Messages for Chat Engagements

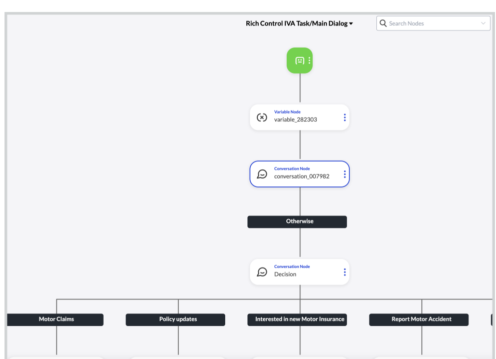
In **Profiles > Chat**, you can define the automated messages that customer see during chat sessions. Enter the text that you want to be displayed for each message. You can configure your VCC Visual IVR settings to display this estimated wait time in your chat or video chat interactions. For more information, refer to the Skill Transfer Module in the Interactive Voice Response (IVR) Administrator's Guide.

> **Note**
> Each automated message can have a maximum of 1024 characters.



- **Welcome Message:** Displayed once the chat interaction is accepted by the agent.
  - **Welcome Message and Digital IVA:** In order to enhance the user experience when utilizing Digital IVA, it's crucial to set up a conversation node within Five9 DVA with a default welcome message. This approach reflects industry standards in AI, emphasizing the importance of greeting customers and clearly communicating bot assistance. Should you have configured both a Campaign Welcome Message and a Five9 DVA welcome message (conversation node), both messages will be displayed to the user.





- **Wait Message:** If configured, this message is displayed while the customer is waiting to be connected to an agent.

- **Dynamic Wait Message:** In situations where the wait time surpasses one minute, this prompt takes precedence over the standard Wait Message. Otherwise, the system will revert to displaying the designated Wait Message.

  If the message contains the tag "<wait>" then the system replaces the tag in the message with the estimated wait time in minutes.

  The system calculates the waiting time every three minutes based on the past hour. This calculation includes only chats that are assigned to an agent. During the three-minute intervals, the same waiting time is displayed regardless of how many or how quickly chat interactions are delivered to agents. The wait time is rounded up to the next minute, so the wait time is two minutes if the calculated time is 61 seconds.

- **Goodbye Message:** Displayed once the chat interaction has ended.

- **Transfer/Requeue Messag:** Displayed when the assigned agent has become unavailable, the chat is being assigned to another agent.

- **No Service Message:** Displayed when no agents are logged into the profile.

Configuring Proactive Chat

Proactive chat differs from a standard link to chat in that it offers chat invitations to your customers in the form of a pop-up window that opens as customers navigate through your web site. Your agents see chat messages as soon as they log in even if they are not set to Ready.

Use proactive chat to display a chat offer to your visitors. You define the parameters based on the visitor's navigation pattern across the web site or within specific pages of a web site. A prompt such as this example enables the visitor to start a chat session. The visitor has an opportunity to either accept or reject the offer.

Your web designer can implement proactive chat and design the prompt and the chat form with JavaScript and CSS. Five9 proactive chat is triggered by time on page, number of pages visited, or hover time on a control.

Before configuring the consoles, your web server must be configured and running.

Configuring the Digital Engagement Administration Console

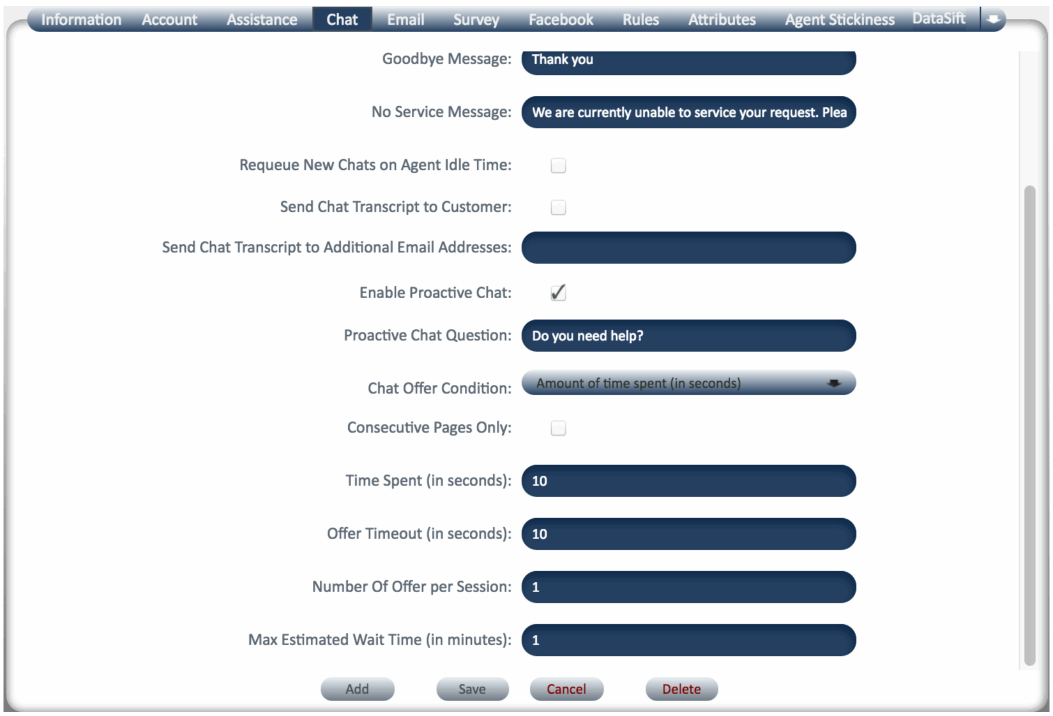
You can configure proactive chat in the Profiles section of the Console. Each profile or campaign has a Chat configuration tab. Proactive chat is disabled by default. To enable it, click **Enable Proactive Chat**.

The options that you need depend on the question shown to the customer and the customer's action:

Parameter	Description
Chat Offer Condition	Visitor action that triggers a chat offer: • **Amount of Time Spent in Web Pages** • **Mouse Hover Time** • **Number of Visited Web Pages**
Proactive Chat Question	Question to present to the customer when a chat is offered.

Amount of Time Spent in Web Pages

Chat offers are triggered by the amount of time a user spends in a web page.

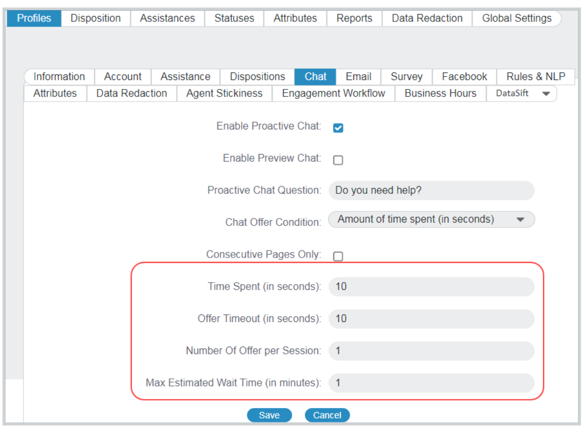


Parameter	Description
Consecutive Pages Only	Whether to prevent the chat offer from being shown to customers on successive pages. • True: Show the chat offer on successive pages. • False: Disabled by default.
Max Estimated Wait Time	Number of minutes. An offer is presented to customers if the estimated waiting time for and agent is less than this value. The estimated waiting time is the current average waiting time for a chat customer to get connected with an agent. The time is based on the statistic of the last hour for a given skill.
Number of Offers per Session	Maximum number of chat offers to show to the customers if criteria are met. Once the limit has been reached, customers do not see further offers. New sessions reset the counter.

Parameter	Description
Offer Timeout	Number of seconds to wait for the customer to acknowledge an offer before hiding it.
Time Spent	Number of seconds to wait before showing a chat offer.

Mouse Hover Time

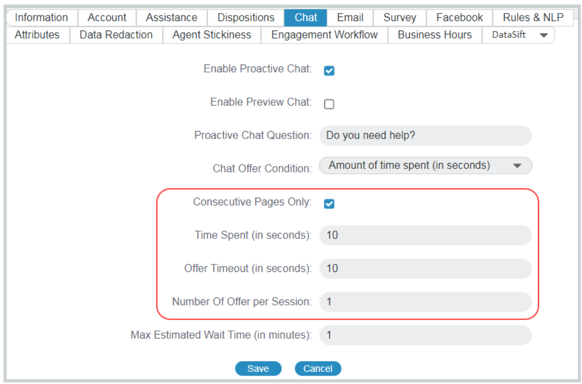
Chat offers are triggered by the amount of time a user spends hovering over a field with the mouse.



Parameter	Description
Hover Duration	The amount of time the visitor must wait in a field before the chat offer is presented.
Max Estimated Wait Time	Number of minutes less than the calculated Dynamic Wait Time to trigger chat offers. The estimated waiting time is the current average waiting time for a chat customer to get connected with an agent. The time is based on the statistic of the last hour for a given skill.
Number of Offers per Session	Maximum number of chat offers to show to the customers. Once the limit has been reached, customers do not see further offers. New sessions reset the counter.
Offer Timeout	Number of seconds to wait before hiding the offer after it has been shown.

Number of Visited Web Pages

Chat offers are triggered by the number of pages that your customers have visited in your Web site.



Parameter	Description
Consecutive Pages Only	Whether to prevent the chat offer from being shown to customers on successive pages. • True: Show the chat offer on successive pages. • False: Disabled by default.
Number of Offers per Session	Maximum number of chat offers to show to the customers. Once the limit has been reached, customers do not see further offers. New sessions reset the counter.
Number of Pages	Number of pages visited at your web site by the customer that triggers a chat offer. The chat offer is displayed only if the current estimated waiting time is less than the specified value.
Offer Timeout	Number of seconds to wait before hiding the offer after it has been shown.

Integrating Proactive Chat in Your Web Site

This section describes how to configure Proactive Chat by adding components and scripts in your web pages. It also describes how you can customize your Proactive Chat implementation.

Adding the Proactive Chat Components
Adding the Proactive Chat Scripts
Customizing Your Implementation

Combining Proactive Chat and Standard Chat

Adding the Proactive Chat Components

You can add proactive chat to your web site, by pasting CSS and JavaScript code into each HTML page where you want to offer Proactive Chat to your customers.

Add these lines to the <head> tag of the HTML pages:

```
<link rel="stylesheet" href="https://ap-
p.five9.-
com/consoles/ProactiveChat/stylesheets/five9proactivechat.css">
<script src="https://ap-
p.five9.-
com/consoles/ProactiveChat/javascripts/five9proactivechat.js">
</script>
```

Adding the Proactive Chat Scripts

Add these scripts at the bottom of the <body> tag of each HTML page where you want to use Proactive Chat:

- **Five9ProactiveChat.init()**: This function below is identical in each page.
- **Five9ProactiveChat.startNewPage**: This function below contains page-specific parameters.

Five9ProactiveChat.init()

This script contains the required and optional parameters to use Proactive Chat:

```
var options = {
    restAPI: 'https://app.five9.com',
    chatConsole: 'https://app.five9.com/consoles/ChatConsole/
        index.html',
    tenant: 'MyTenantName',
    notificationType: 'notification'
};
Five9ProactiveChat.init(options);
```

This table describes the parameters.

Name	Data Type	Description
chatConsole	string	Required. Root URL of the Five9 Chat Console.

Name	Data Type	Description
`chatOptions`	`string`	Optional. Whether to enable any of these options (true or false) for your customer: `showPrintButton`: Displays a button to print the chat transcript. The button opens the print dialog for the browser. The ability to print depends on the user's browser and computer. `playSoundOnMessage`: Plays a sound when a new message arrives if `allowCustomerToControlSoundPlay = true`. `allowCustomerToControlSoundPlay`: Enables the user to control the sound (on or off). `allowUsabilityMenu`: Displays options to modify the type size and the level of contrast. For more information, see in the consoles chapter. `theme`: Optional. Use a predefined or custom theme. The default is `default-theme.css`. See **Choosing Your Chat Console Theme** for more details.
`customChatFields`	`object`	Optional. Passes the object to the chat console as the `fields` option. You can pass custom fields, data, and show or hide the email and name fields. For usage information, see **fields** in the console script section. For example, to hide the email field in the chat console, use this syntax: `{email:{value:"",show:false}}`
`notificationType`	`string`	Required. Method used to invite customers to chat: `callback`: JavaScript callback `modal`: Full-screen pop-up window displayed to customers. `notification`: Default. Chat offer displayed in the lower right corner of the page. For more details, see Notification Types below.
`restAPI`	`string`	Required. URL of the Five9 REST API: `https://app.five9.com`
`showProfiles`	`boolean`	Optional. Whether customers may choose a campaign.

Name	Data Type	Description
		`true`: Default. `false`: The profile menu is hidden.
`tenant`	`string`	Required. VCC domain name.
`theme`	`string`	Optional. The default is `default-theme.css`. For more information, see **Choosing Your Chat Console Theme**.
`title`	`string`	Optional. Title to display in the console title bar, such as the name of your company.

Notification Types

Additional parameters to further define the chat interaction noitification.

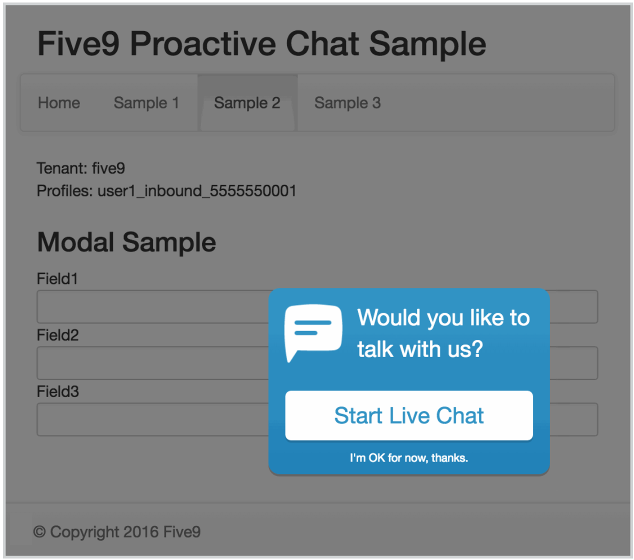
- `callback`: JavaScript callback called when a chat offer is shown. Within this callback, developers can perform any needed functionality, including accepting or declining the chat invitation:

  ```
  function(question, timeout) {
  // owner site can perform any needed functionality
  }
  ```

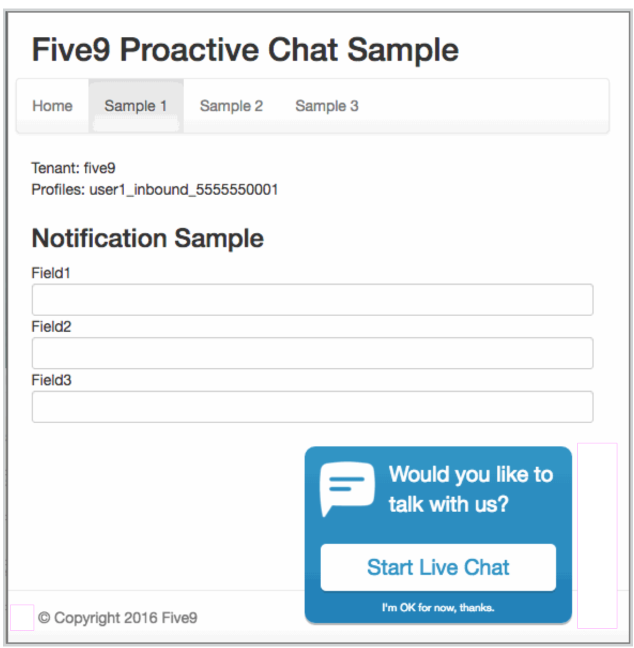
  You can find these parameters in the Digital Engagement Administration Console. For more information, see the `ProactiveChat` example in the archive that you downloaded.

  - question (string): Question to ask the customer. Located in the **Proactive Chat Question** field.
  - timeout (integer): Number of seconds to wait before hiding the offer after it has been shown. Located in the **Offer Timeout** field.

- `modal`: Customers must accept or decline the chat offer before being allowed to continue to use your site.



- `notification`: The chat offer appears in the lower right corner of the page. The customer can continue to use the site without interruption. The notification disappears after the set time or if the customer declines the notification by clicking **no thanks**.



Five9ProactiveChat.startNewPage

Each page in your site should contain this function, which contains page-specific parameters.

```
var parameters = {
    pageId: 'sample-1',
    profiles: ['Sales'],
    fields: ['page1-f1','page1-f2','page1-f3']
};
Five9ProactiveChat.startNewPage(parameters);
```

This table describes the parameters

Name	Data Type	Description
fields	string[]	Required. Unique IDs of the page fields. Identifies fields when Chat Offer Condition is set to Mouse Hover.
pageId	string	Required. Unique ID of the page.
profiles	string[]	Required: at least one profile. Profiles route chat sessions and email messages to agents who have the appropriate skills. Profiles are loaded once at the beginning of each session and persist in the browser. Each new tab starts a new session, which resets and reloads the chat profiles.

Customizing Your Implementation

These sections in the consoles chapter describe how to customize proactive chat:

Choosing Your Chat Console Theme
Adding Fields and Customizing Labels
Hiding System Fields

Combining Proactive Chat and Standard Chat

Five9 does not recommend that you use proactive chat and standard chat on the same page. However, if you choose to do so, follow these steps:

1. Ensure that all your configuration options, such as profiles and showProfiles, are identical.

2 Add this script to the page:

```
<script>
    var target = document.body;
        var observer = new MutationObserver(function(mutations) {
        mutations.forEach(function(mutation) {
            if (mutation.addedNodes.length && mutation.addedNodes
            [0].className === 'five9-frame') {
                $('#five9-maximize-button').click();
                setTimeout(function () {
                $('#five9-minimize-icon').click();
                }, 500);
            }
        });
    });
    var config = { attributes: false, childList: true,
    characterData: false };
    observer.observe(target, config);
</script>
```

Customizing the Chat Console

The Five9 Chat Console enables you to offer chat conversations to your customers.

Customizing Fields in the Chat Console

Adding Fields and Customizing Labels

To make your custom fields required, add the required: true attribute shown below. You can add fields and customize the labels that appear in the chat console, for example:

```
var fields = {
name: {
    // Set the label for a system field.
    label: 'Custom Name'
```

```
},
    // custom fields
    NewField1: {label: 'New Field 1', required: true},
    NewField2: {label: 'New Field 2'}
};
Five9SocialWidget.addWidget({
    type: 'chat',
    fields: fields,
...
};
```

Using Variables in the Chat Console

You can use variables to enhance the interaction or capture additional information.

> **Example**
>
> When a customer submits a chat request with an account number, you can pass the account number in a connector to a third-party system to present the customer's account information to the agent.

1 Create a custom chat console field named **contact_id** as described in the previous section.

2 To store the new custom field, use the call variable named **Omni.contact_id**.

   For digital engagement interactions, you must use the call variable group named **Omni**.

3 Configure a connector to pass the value.

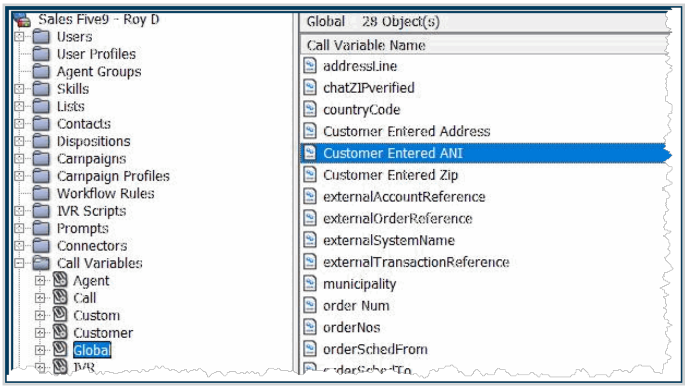
For more information about variables, see the Basic Configuration Administrator's Guide.

Customizing Variables and Labels

You can create and use custom variables, defined within your JavaScript, using **<Call Variable Group>.<Call Variable Name>** format. An example defining **Global.Customer Entered ANI** is shown below.

```
"fields": {
    "Global.Customer Entered ANI": {
            "value": "",
            "show": true,
            "label": "Phone Number"
    }
```

```
},
```



Hiding System Fields

The system fields for the chat is as follows:

Chat Console
email
name
profiles
question

System fields are required. Only `profile` and `email` can be hidden. If `profile` is hidden, the first profile in the list is used. To hide a custom field, use the `show` property with the value `true` or `false`. If the `email` field is hidden, a generic email value is generated and is sent to the system. This example shows the `email` field hidden:

```
var fields = {
    email: {
        // Hide the email field.
        show:false
    }
};
Five9SocialWidget.addWidget({
    type: 'chat',
    fields: fields,
    ...
};
```

Using Business Hours Settings

You may configure your chat availability to follow your defined business hours. This enables you to offer chat options during a defined schedule. If agents become unavailable during your defined business hours the chats will queue for availability. To enable using business hours, set the `useBusinessHours` parameter to `true` in the JavaScript function or directly into the URL query string.

```
Five9SocialWidget.addWidget({
    type: 'chat',
    rootUrl: '../',
    tenant: 'tenant',
    profiles: 'profiles',
    title: 'title',
    useBusinessHours: true,
});
```

Customizing the Chat Tab

To customize the chat tab that your customers click to request a chat session with an agent, modify the CSS. The `!important` declaration enables you to modify the look and feel of the chat window and tab while ensuring that the style is not overwritten with any subsequent style sheet loading.

The example below shows the chat button modified to display a larger font size and the words `Chat Now`. Place `!important` at the end of the declaration that you want to customize, just before the semicolon.

```
<style type='text/css'>
.five9-chat-button {
font-size: 24px !important;
}
.five9-chat-button:after {
content: 'Chat Now' !important;
}
#five9-popout-button {
float: right;
}
</style>
```

Hiding the Chat Button in the Footer

To hide the chat button in the footer, use this CSS:

```
. five9-frame-minimized {
display: none !important;
```

```
}
```

Creating a Chat Link Elsewhere on the Page

To create a link anywhere else on the page to open Five9 chat, use this function:

```
<a class="nav-link launchChat" href="#">Chat with Sales</a>
<script type="text/javascript">
    $(function() {
        $('.launchChat').click(function(event) {
            $('#five9-maximize-button').trigger('click');
            event.preventDefault();
        });
});
</script>
```

Adding a Survey Comments Field

You can require or show survey comments by adding `surveyOptions` to the function, for example:

```
Five9SocialWidget.addWidget({
    type: 'chat',
    /* [... other options], */
    surveyOptions: {
        showComment: false, // Default true
        requireComment: true // Default false
    }
});
```

Hiding the Five9 Information

You can hide the Five9 information (*Provided by Five9*) at the bottom of the chat console with a custom style element:

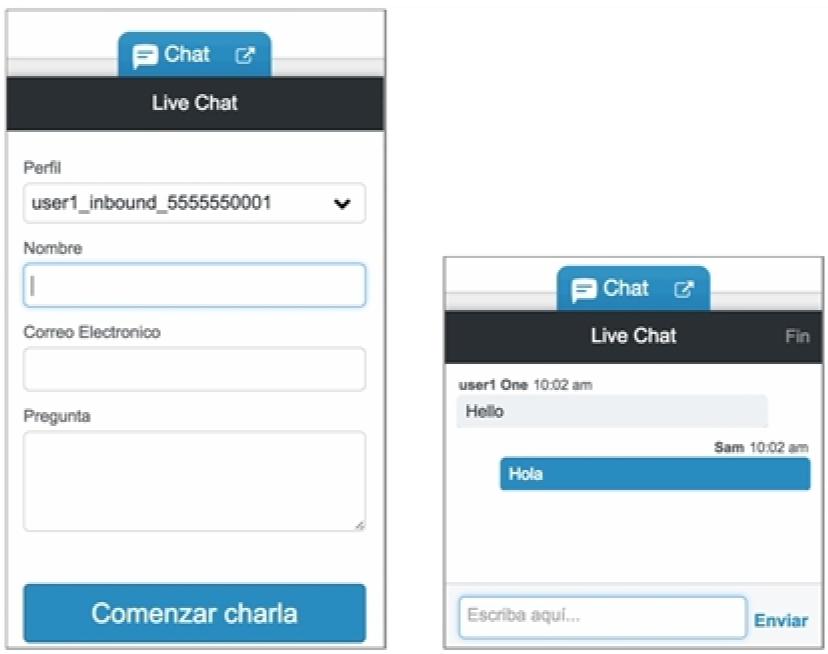
```
/* Hide provider link */
.provider, .provider:hover, .provider:focus, .provider-text {
    cursor: default !important;
    display: none !important;
}
```

This snippet is included in the CSS example in the archive that you downloaded (Five9 Consoles Examples\Chat\CSS).

You may also hide the information by deleting the `S_PROVIDER` string in your custom language file.

Adding a Custom Language File to the Chat Console

This feature does not apply to proactive chat. You can customize the language of the text in the chat console window by adding the `lang` option to the chat widget script. To add a custom language file for your chat console implementation, add the URL of a custom language file that you are hosting. The graphic below shows a Spanish language custom language file.



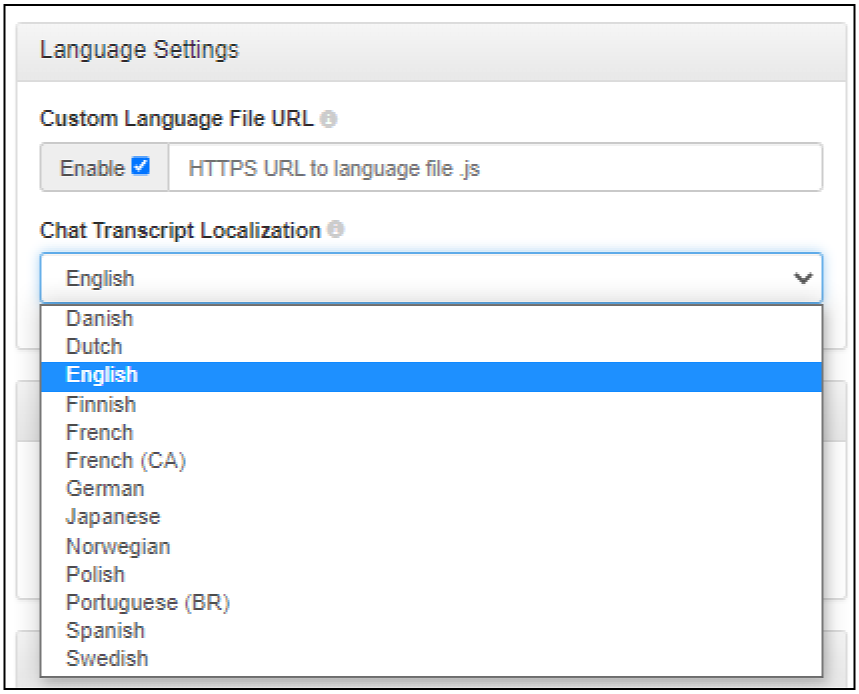
Example

Custom language files:

- English custom language file
- Spanish custom language file

Chat Transcript Localization

While the classic chat console can be localized in any language by uploading a language file, the transcript for the conversation is supported only in the languages that Five9 supports. You can add `UserLocale CAV` under `fields` that allows you to change the language of the transcript sent to the recipient. The script generator also allows you to select the languages currently supported for the transcript. The chat conversation included in the transcript is in the language used during the chat.




```
"fields": {
      "UserLocale": {
         "value": "en",
         "show": false
}
}
```

Integrating Chat in Your Website

This section guides you through adding a chat console to your website. It includes the necessary CSS and JavaScript to be inserted into each HTML page where you want to offer chat functionality to your customers. The chat console supports a single profile for each webpage. Ensure your web server is configured and running before setting up the chat console.

Allowing Multiple Active Chats/Emails

You can allow multiple active chats and emails at the same time in the same browser by using a `namespace` parameter. The parameter makes the session unique allowing multiple instances. To use a `namespace` parameter, add the value in the Javascript function as shown:

```
Five9SocialWidget.addWidget({
    type: 'chat',
    rootUrl: '../',
    tenant: 'tenant',
    profiles: 'profiles',
    title: 'title',
    namespace: 'Mynamespace',
});
```

Adding Google Analytics Support

Zero-configuration option is not compatible with Internet Explorer version 11.

Five9 Social widget and Five9 proactive chat can be zero-configuration. If you are using Google's most recent method of adding Google Analytics scripts to your page, Five9 scripts detect and retrieve your Google Analytics ID dynamically. Five9 proactive chat is embedded in your web page and has no configuration option. Proactive chat sends events if the function `gtag` is available to send events.

Additional configuration may be required for legacy implementations. In this case, you must add the Google Analytics ID, or `gaid`, to your chat or proactive chat script. The `gaid` option identifies the Google Analytics ID provided by Google. For additional information about using Google Analytics with Five9, contact your Five9 representative.

Adding the Social Widget Script

The Five9 Social widget uses inline CSS. Add this script to the `<head>` tag of the HTML pages:

```
<script src='https://app.five9.com/consoles/SocialWidget/five9-
social-widget.min.js'></script>
```

Opening Chat in a New Window

This JavaScript function assembles the url for the chat window based upon the values in the Config json object and then opens the window.

```
function onOpenChatLink(){
var rootUrl = Config.rootUrl + 'ChatConsole';
var
```

```
 url = rootUrl;var elementCounter = 0;

for (var key in Config) {
   url = url + (elementCounter++ === 0 ? '?' : '&');
   if (Config.hasOwnProperty(key)) {
   url = url + key + '=' + Config[key];
   }
   }
var chatUrl = encodeURI(url);
var props =
'width=350,height=550,location=no,menubar=no,resizable=yes,scrollbars=no
,status=no,titlebar=no,toolbar=no';
window.open(chatUrl, 'Five9Chat', props) =
'width=350,height=550,location=no,menubar=no,resizable=yes,scrollbars=no
,status=no,titlebar=no,toolbar=no';window.open
(chatUrl,'Five9Chat',props)
```

Adding the Script Tag in the <head> Section

An alternative to defining the Config JSON object in the page is to put it in its own .js file and include it in a script tag in the <head> section, description shown below:

> **Note**
>
> The code snippet above represents the contents of the JavaScript file that you are linking with the script tag in the head. This snippet is not actual content to be pasted into the <head> section.

```
// <script src="<URL of config.js file>"><script>
var Config = {
   // type is 'chat' or 'email'
   type: "chat",


   // rootUrl is always as shown below
   rootUrl: "https://app.five9.com/consoles/",


   // tenant is your Five9 Domain name
   tenant: "<Your Domain Name Goes Here>",


   // profiles or profiles that applies to the chat session
   profiles: "Chat - Customer Support",


   // title of the chat window
   title: "Custom Chat Title",


   // theme - There are 3 theme files available from Five9, or it may
   point to your own custom CSS file
   theme: "default-theme.css",
   //theme: "lime-time.css",
```

```
    //theme: "flagship.css",
    fields: {},

    // showProfiles controls whether a dropdown appears for the cus-
    tomer to choose from - If only 1 profile is listed under profiles
    this option is best left as 'false'
    showProfiles: false
};
```

Adding the Consoles Script

Add this script at the bottom of the `<body>` tag of the HTML pages. The script contains the required and optional parameters to use the chat and email consoles:

```
<script>
Five9SocialWidget.addWidget({
        type: 'chat',
        rootUrl: 'https://app.five9.com/consoles/',
        tenant: 'MyTenantName',
        title: 'My Company Name',
        profiles: ['Questions and Concerns','Sales'],
        showProfiles: true,
        enableCallback: true,
        callbaclList: callback_list,
        theme: 'default-theme.css'
        });
</script>
```

Important

If you are installing basic chat on sites built with Wordpress, you must use the Wordpress Insert Headers and Footers plug-in, available at WordPress.org, to add the following Five9 Social Widget header and footer code.

Header Code:

```
<script
src="https://app.five9.com/consoles/SocialWidget/five9-social-
widget.min.js"></script>
```

Footer Code:

The footer code must contain the contents of the .txt file. If you are implementing chat on a site built using WordPress, you can use the Five9 WordPress plug-in to implement Five9 chat without JavaScript.

This table describes the parameters.

Name	Data Type	Description
`chatOptions`	`string`	Optional. Whether to enable any of these options (true or false) for your customer: • `showPrintButton`: Displays a button to print the chat transcript. The button opens the print dialog for the browser. The ability to print depends on the user's browser and computer. • `playSoundOnMessage`: Plays a sound when a new message arrives if `allowCustomerToControlSoundPlay = true`. • `allowCustomerToControlSoundPlay`: Enables the user to control the sound (on or off). • `allowUsabilityMenu`: Displays options to modify the type size and the level of contrast. For more information, see **High Contrast Chat Console**. • `autostart`: Enables the chat session to bypass the form and proceed directly to queue for an agent when contact name and email have been pre-populated. Possible values are `true` and `false`. Default value is `true`. • `theme`: Optional. Use a predefined or custom theme. The default is `default-theme.css`. See **Choosing Your Chat Console Theme** for more details. • The URL of the default theme enables you to use your CSS but also some of the elements of the default theme: `https://app.five9.com/consoles/Common/css/themes/default-theme.css`.
`fields`	`object`	Optional. Apply a field template to the chat console. For more details, see **Customizing Fields in the Chat Console**.
`lang`	`string`	Custom language file. For more information, see **Adding a Custom Language File to the Chat Console**.
`logo`	`url`	Optional. Image to display in the console title

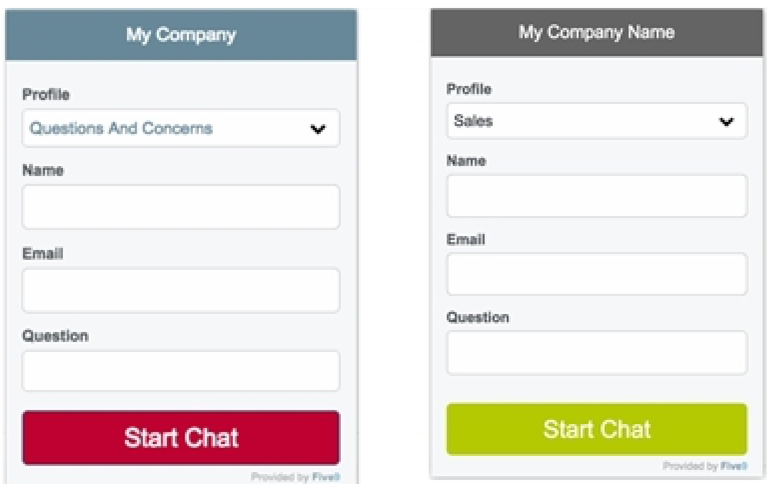
Name	Data Type	Description
		bar. If a logo and title are specified, the logo is used.
`profiles`	`string[]` or `string`	Required. Profiles route chat sessions and email messages to agents who have the appropriate skills. Enter either an array of strings or one string of comma-separated profiles.
`rootUrl`	`string`	Required. URL of the Five9 consoles.
`showProfiles`	`boolean`	Optional. Whether customers may choose a profile. • `true`: Default. • `false`: The profile menu is hidden.
`enableCallback`	`boolean`	Optional. Whether to allow a chat customer to provide a callback number as a chat alternative. • `true`: The callback number entry is provided. • `false`: Default. The callback option is hidden.
`callbackList`	`string`	Optional. Callback list object in VCC when chat callback option is enabled.
`tenant`	`string`	Required. Tenant or domain name, which you can obtain from Customer Support and the Digital Engagement Administration Console.
`theme`	`string`	Optional. Use a predefined or custom theme. The default is `default-theme.css`. See **Choosing Your Chat Console Theme** for more details. The URL of the default theme enables you to use your CSS but also some of the elements of the default theme: `https://app.five9.com/consoles/Common/css/themes/default-theme.css`.
`title`	`string`	Optional. Title to display in the console title bar, such as the name of your company.
`type`	`string`	Required. Type of widget to create: `chat` or `email`.

Choosing Your Chat Console Theme

You may define your either a default or a custom theme with a CSS. The Five9 default CSS is located at `https://app.five9.com/consoles/Common/css/themes/default-theme.css`.

- Predefined Themes: The themes are located in the console application: `default`, `flagship` (left), and `lime-time` (right). The themes use neutral colors that are suitable for many web sites. The main differences are in the colors of the header and the button. Enter the name of the theme in the `theme` property when creating the social widget, for example:

```
Five9 SocialWidget.addWidget({
    theme: 'lime-time.css',
    ...
```



- Custom Theme

  You can customize every aspect of the console by using a custom style sheet. To do so, enter the URL of your file.

```
Five9 SocialWidget.addWidget({
    theme: 'https://<my-web-site>/css/<my-custom-theme.css>',
     ...
```

Configuring SMS Interactions

Five9 SMS messaging is configured as a chat interaction and uses the Five9 chat console interface to distribute these messages to your agents. To use SMS messaging for your contact center, you must have the following features enabled:

- Five9 Chat
- Five9 Messaging
- SMS DNIS available for campaigns

For any questions about these features for your contact center, contact your Five9 representative.

You must configure the SMS messaging options (see Configuring Chat Setting and Transcript Options).

SMS interactions arrive with the contact phone number and SMS question identified and are ready for interaction routing.

> **Note:** Five9 creates a contact record for SMS interactions that are received by Five9 without an existing contact record. In this instance, the name and email fields are populated with <PhoneNumber>@anonymous.com. **Example**:9255551212@anonymous.com.

Alphanumeric & Shortcodes

Shortcodes, typically five to six digits long, allow for direct customer engagement through SMS or MMS, enabling significantly higher messaging volumes in shorter durations compared to standard long codes or Toll-Free Numbers (TFNs). At Five9, Shortcodes are currently limited to the US.

Shortcodes are designed for high-throughput messaging, such as programmatic or broadcast communications, with default capacities reaching up to 100 messages per second. They are tailored for specific use cases and can serve as an effective alternative to long codes when facing carrier-imposed restrictions on message delivery.

Common use cases for Shortcodes include system or account alert notifications, promotional or marketing alerts, two-factor authentication (2FA) or one-time passwords, and reminders for upcoming payments or appointments.

Shortcodes are designated for messaging within the specific countries they're provisioned for. Therefore, a US Shortcode wouldn't be suitable if your audience isn't in the US. Additionally, Shortcodes require explicit user consent for SMS messaging; usage without consent is prohibited.

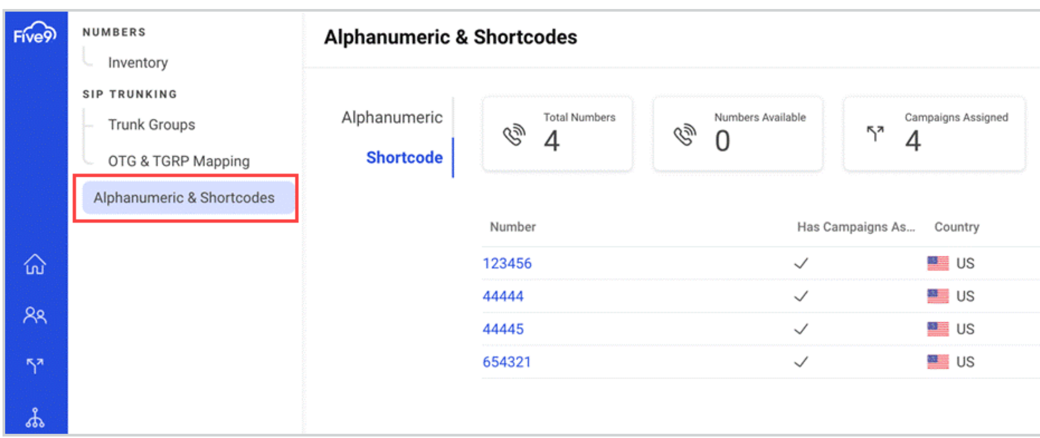
There are restrictions on the type of content and campaigns allowed via Shortcodes, as determined by Five9 and carriers. Prohibited uses include campaigns without verifiable user consent, adult content, lead generation-only services, and messaging for multiple financial entities. It's essential for a single entity to manage any campaign to maintain control over message content and frequency.

While certain use cases like age-restricted content and direct lender services are permitted, they're subject to additional carrier requirements and may encounter delays in provisioning.

Certain campaigns are not supported by Five9 and/or carriers, such as those unable to obtain explicit end-user consent, containing sexual/adult content, solely aimed at lead generation or data collection, or representing multiple financial institutions. Additionally, Shortcode messaging campaigns must be managed by a single entity to ensure consistency in message content and delivery frequency.

Allowed use cases include age-restricted content (Tobacco, Alcohol, etc.), sweepstakes or contests, and loan-related use cases for direct lenders. However, they may undergo additional scrutiny and take longer than usual to provision.

Shortcodes are provisioned through the Admin Console and anchored to numbering definitions. The Five9 provisioning team handles Shortcode provisioning after the registration process is completed. Please refer to the registration requirement section to understand what's necessary to register for a Shortcode number. Once the numbers are provisioned, corresponding permissions must be enabled for them to be accessible in the Admin Console.

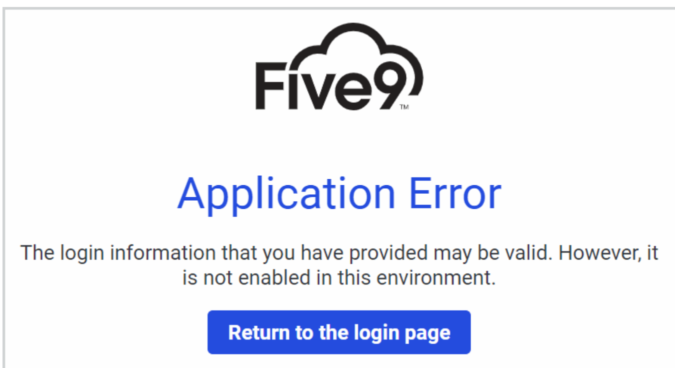


Logging In

You use the Five9 Administrator Console to log into your Five9 account and access Agent Assist Studio.

1 Enter the URL that applies to your location.
    - US domains: https://admin.us.five9.net/
    - Canadian domains: https://admin.ca.five9.net/
    - UK domains: https://admin.uk.five9.net/
    - European domains: https://admin.eu.five9.net/
2 Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



> **Note:** If you don't see the Shortcodes card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

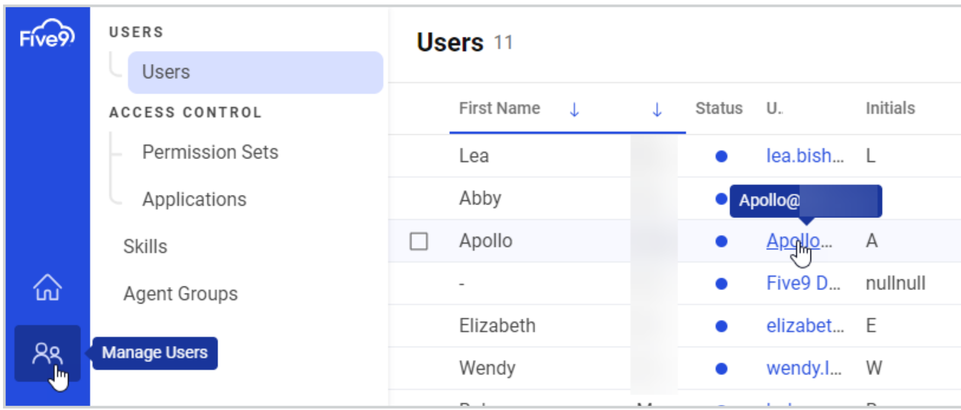
Permissions and Permission Sets

Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view and edit the Alphanumeric & Shortcodes card in Admin Console.

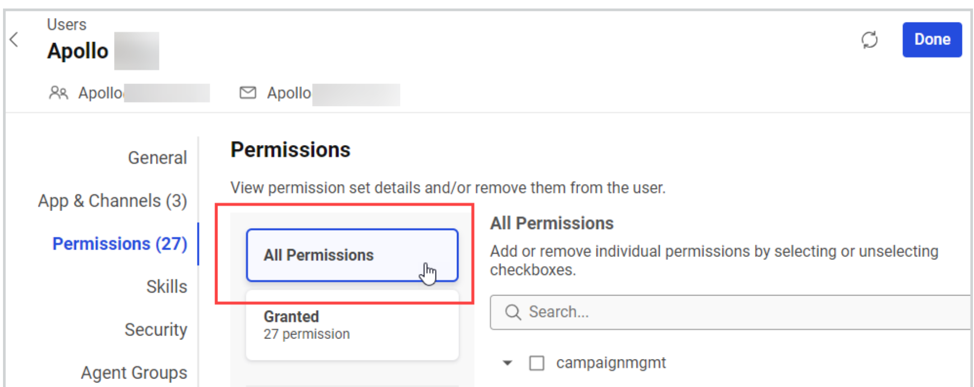
> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

Assigning Permission Sets

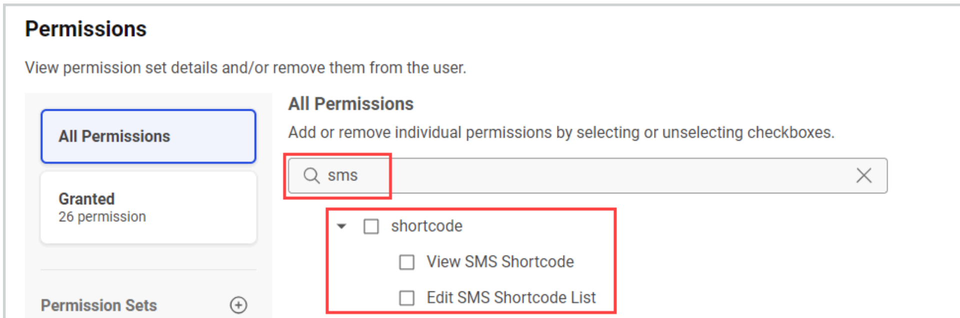
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select **All Permissions**.



3 Type the permission group name from the table in [Alphanumeric & Shortcodes Permissions] into the search field or scroll the list to the permission group, and select the desired permissions or group.

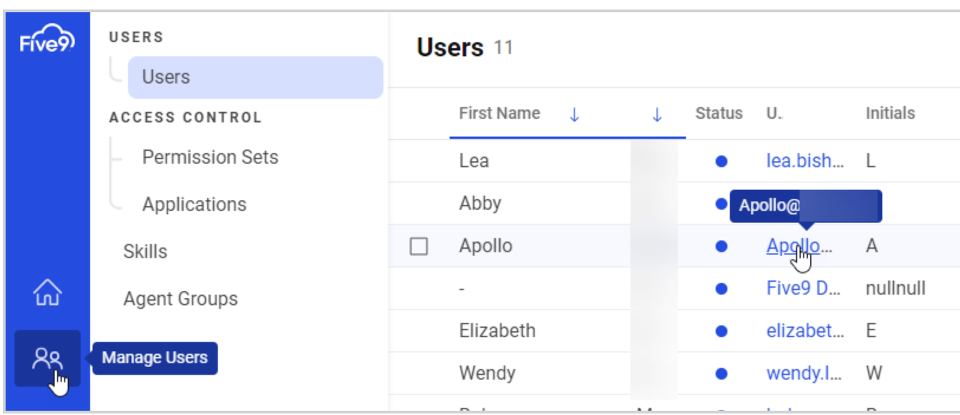


4 Select **Done**.

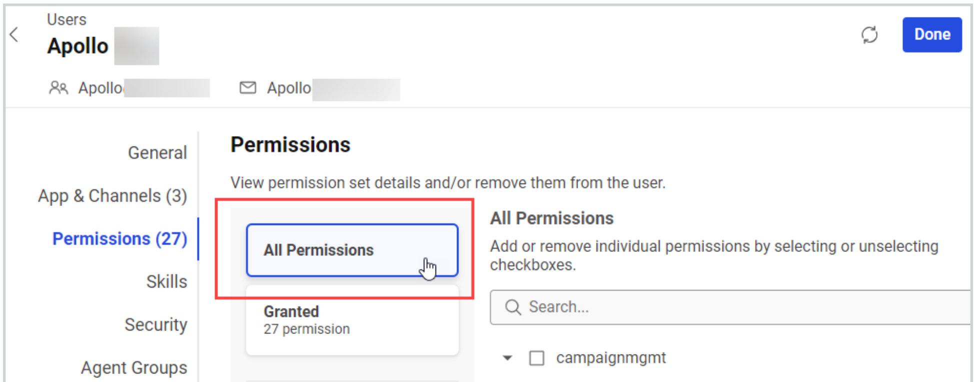
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

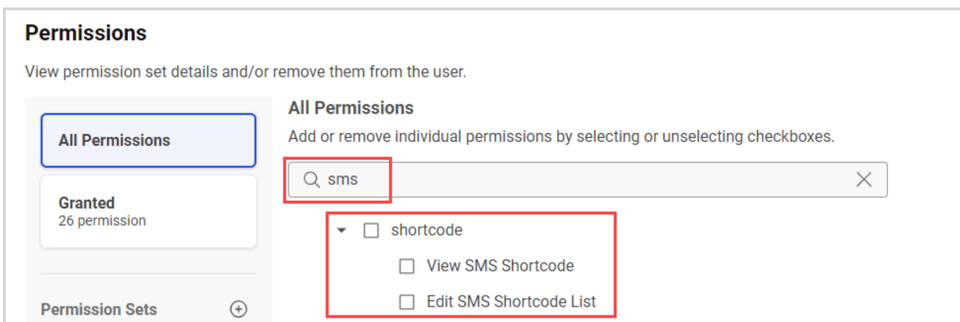
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select All Permissions.



3 Type the permission group name from the table in [Alphanumeric & Shortcodes Permissions](#) into the search field or scroll the list to the permission group, and select the desired permissions or group.



4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

Alphanumeric & Shortcodes Permissions

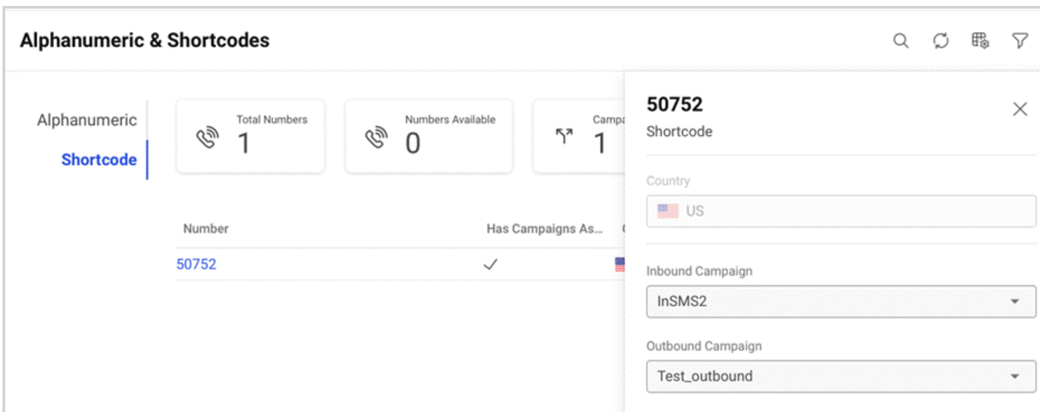
This section presents the individual user permissions required to view the Alphanumeric & Shortcodes card on the Admin Console home page and access the described features. The Alphanumeric & Shortcodes permissions are:

Group	Subset	Permission	Description
sms	shortcode	View SMS Shortcode.	To view the existing Shortcode list, users must have the appropriate permission. Without this permission, they cannot access the Shortcode page in the Admin Console.

Group	Subset	Permission	Description
		Edit SMS Shortcode list.	Users with the edit permission for the Shortcode list can update the status and import data into the page.

Update Campaigns

Users with edit permissions can update the campaigns associated with Shortcodes by clicking on the corresponding enabled number. Once the campaigns have been associated, users can see a validation mark against the Shortcode number if the campaign is assigned to the number.



Application Requirements

Application requirements to enable Shortcodes:

- The short code registration process begins with updating an application. Organizations must provide the following crucial information to proceed with the application:
    - Example messages of the actual messages that will be sent through the Shortcode.
    - The SMS program brand's website must be live before carriers will review the Shortcode application.
- A visual representation of the end-user consent process showcasing the call to action for users to sign up and receive messages via the Shortcode. This mockup must adhere to specific criteria detailing what information must be presented to

users before obtaining their consent for message receipt from a Shortcode. Failure to incorporate these mandatory elements will result in carriers rejecting the consent flow.

- A letter of authorization from the brand appearing in your messaging.
- A compliant screenshot, link, or mockup of the SMS Terms of Service is required. While these terms do not need to be actively published on your website during the application process, a draft must be submitted for carrier approval of the Shortcode program. Ensure that the SMS Terms URL is activated before the launch of the Shortcode program.

Once the application is submitted, Five9's internal review of the submitted materials will take a week. It will then be sent to carriers for approval through our integrator. Major carriers take about six to ten weeks to approve. Please note, approvals are subject to carrier discretion, and approval may take longer based on the use case and industry.

Upon approval, it is essential to configure your Shortcode to acknowledge and respond to the mandatory compliance keywords HELP and STOP. Additionally, you must incorporate an effective blacklist mechanism to handle STOP requests appropriately.

Regulations Applicable

Regulations applicable for Shortcodes:

- Five9 will not approve Shortcode applications that do not comply with our Acceptable Use Policy (AUP).
- Customers are required to adhere to the regulations set forth by the Telephone Consumer Protection Act (TCPA).
- Before forwarding applications to carriers for review, Five9's providers conduct their compliance assessments. These providers may enforce their policies, which, while generally in agreement with carrier standards, dictate what they will accept or decline for submission.
- The CTIA, a carrier trade association, mandates specific guidelines for Shortcode campaigns as outlined in the CTIA Shortcode Compliance Handbook.
- It's important to note that carriers reserve the right to approve or reject any use case on their network, regardless of whether all stipulated requirements have been satisfied.

SMS Options

Opt-in/Opt-out Regulation

U.S. regulatory and telecommunication industry rules governing businesses and organizations' use of SMS to communicate with Consumers ensure that they only receive SMS communications they want to receive from businesses or organizations.

SMS consumers should have a transparent opt-in/opt-out mechanism. Consumers must consent to all recurring messages; entering a mobile phone number does not necessarily constitute a compliant opt-in. For these reasons, Organizations sending SMS to consumers need to provide an option for Consumers to opt-in. It then needs to follow up by sending a confirmation message to the user. For recurring message programs, confirmation messages must include clear opt-out instructions. Messages should also remind consumers from time to time that they are still enrolled – This is a recommended process to sign-up Consumers for regulatory Opt-in/Opt-out SMS features.

Blocking Objectionable Content

You may have set up a method to report spam and objectionable content. Five9 does not filter the media for unwanted or disallowed content, such as SHAFT. SHAFT is an acronym for sex, hate, alcohol, firearms, and tobacco. SHAFT guidelines should be taken seriously by any businesses communicating with their customers to ensure that they comply with Cellular Telecommunications and Internet Association (CTIA) guidelines. Any messages that contain prohibited content are likely to be blocked by carriers. For more information, see CTIA.

Note

For more information about CTIA Messaging Principles and Best Practices concerning SMS, see Section 5.1 Consumer Content in Non-Consumer (A2P) Best Practices

SMS Attachments

Users can submit attachments to their SMS. However, for the SMS attachments file name, Five9 only supports lowercase and uppercase ASCII letters, decimal digits, "!", "*", "+", "-", "/", "=", and "_".

Important

An agent can only send an attachment if they have the *User can send messaging attachments* permission selected on the Roles: Permission dialog.

Each major carrier in the US has an MMS message file size limit:

- AT&T: 1 MB
- Verizon: 1.2 MB
- Sprint: 2 MB
- T-Mobile: 1 MB

Note

The file sizes above will generally be passed along to the wireless carriers. However, due to the differences in handsets, file types, and transcoding, Five9 recommends you send attachments no larger than 500KB to ensure the best chance of delivery. Also, unlike other media types, the maximum .txt file size supported is 64KB per attachment.

Supported SMS Attachment File Types

The most widely supported attachment types are jpeg, png, and gif images. Five9 accepts all SMS content types on the list below, but delivery is not guaranteed since downstream carriers and handsets may have limitations on what types of files they accept.

Extension	File Type
.json	application/json
.ogv, .oga, .ogx, .ogg,	application/ogg
.pdf	application/pdf
.rtf	application/rtf
.zip	application/zip
.tar	application/x-tar
.xml	application/xml

Extension	File Type
.gz	application/gzip
.bz2	application/x-bzip2
.gz	application/x-gzip
.smil	application/smil
.js	application/javascript
.m4a, .m4p, .m4b, .m4r	audio/mp4
.mp1, .mp2, .mp3, .m1a, .m2a, .mpa	audio/mpeg
.oga	audio/ogg
.flac	audio/flac
.webm	audio/webm
.wav	audio/wav
.amr, .3ga	audio/amr
.3gp	audio/3gpp
.bmp, .dib	image/bmp
.gif	image/gif
.jpg, .jpeg	image/jpeg
.pjpeg	image/pjpeg
.png	image/png
.svg	image/svg+xml
.tiff, .tif	image/tiff
.webp	image/webp
.ico	image/x-icon
.css	text/css
.csv	text/csv
.ics	text/calendar
.txt	text/plain
.js	text/javascript
.vcf, .vcard	text/vcard
.wap	text/vnd.wap.wml

Extension	File Type
.xml	text/xml
.avi	video/avi
.mp4, .m4v	video/mp4
.mpg, .mpeg, .m1v, .mpv	video/mpeg
.ogv, .ogx, .ogg, .spx, .ogm	video/ogg
.mov.qt	video/quicktime
.webm	video/webm
.wmv	video/x-ms-wmv
.flv	video/x-flv

Note

There are only a few file types that Five9 does not support as attachments. If a file type is not listed above, it is not yet supported.

Toll-free (TFN) SMS Attachments Support

Images, videos, audio, and text file attachments are supported across all major U.S. wireless carriers and tested with iOS and Android devices/operating systems. While both the destination mobile operator and device ultimately determine compatibility, most mobile operators and handsets render the SMS file types specified here:

Extension	Content Type	Notes
.wav	audio/wav audio/x-wav	AT&T Note: For iOS, AT&T will transcode .wav files to .3gp audio files before delivering to handsets.
.ac3	audio/ac3	
.amr	audio/amr	
.png	image/png	
.jpeg	image/jpeg	
.gif	image/gif	
.bmp	image/bmp	

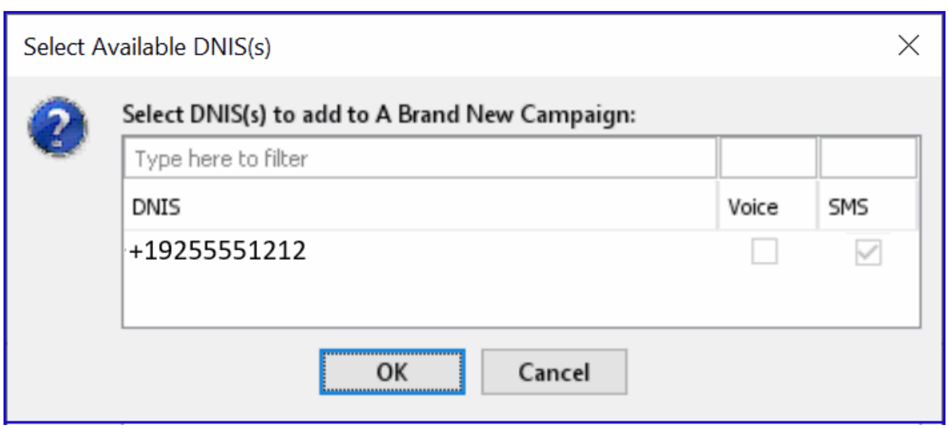
.mp4	video/mp4	
.avi	video/x-msvideo	iOS and Android don't support AVI natively. Although the file will be sent, it typically won't play on these device without third-party apps installed.
.txt	text/plain	Unlike other media types, the maximum .txt file size supported is 64KB per attachment.

The maximum size you can send outbound, including all attachments per SMS message, is 525KB. If the total size of SMS message media/attachments exceeds 525KB, the interaction will receive a call-back error.

The maximum number of attachments supported is 10If you attempt to send more than 10 attachments, the message will fail to be accepted and return a 400 Bad Request Error: "media must contain at most 10 media attachments." The total size of 10 attachments must still be 525KB or less.

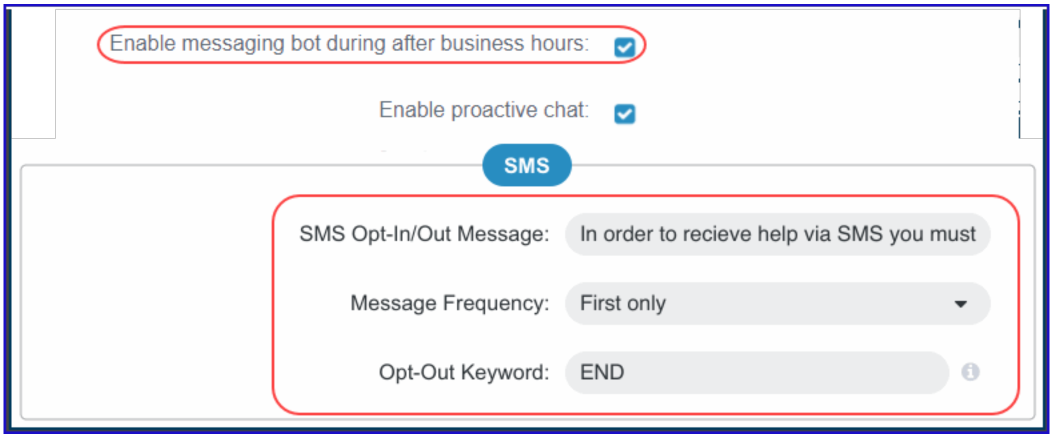
Enabling Basic SMS Messaging

To enable Five9 messaging for your contact center, assign an SMS DNIS number to an inbound campaign. For more information, see Five9 Campaign Administrator's Guide, ***Assigning DNIS to an Inbound Campaign***.



Enabling Automated SMS Messaging

To enable after-hours SMS messaging, select **Enable messaging bot during after business hours**.



Five9 Engagement Workflow offers enhanced functionality to distribute or respond to your SMS interactions. The Five9 Interactive Virtual Assistant (IVA) enables you to further augment your SMS interaction capabilities and pass interaction control to a chatbot, or virtual assistant. For more information, see Five9 IVR Administrator's Guide, ***Five9 Engagement Workflow*** and ***IVA Transfer Module***.

Routing Interactions Using SMS Number

You can send your SMS messages directly to an IVR Agent Transfer or Skill Transfer module by creating a custom variable. This custom variable may also be used for your VCC call reports.

Creating the Custom Variable

You must create a custom variable in the Custom variable group named **campaign_ sms_number**. This name is case sensitive.

Example: `Custom.campaign_sms_number`

For more information about creating custom variables, see Five9 Basic Administrator's Guide, ***Creating Call Variables***.

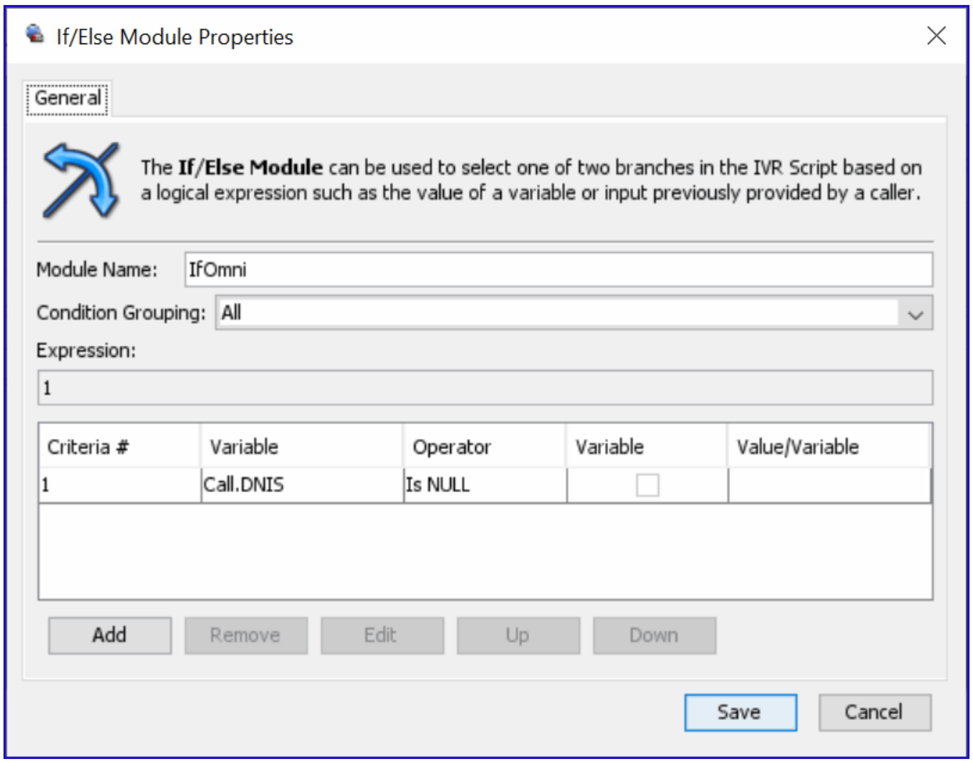
Building Your Routing Strategy

This example shows a basic IVR script that uses a custom variable to route SMS messages to a specific agent. You can also route SMS interactions to a specific skill. You can modify this example or design your own script to best accommodate your business needs. See Five9 IVR Administrator's Guide for more information about creating IVR Scripts or using the Five9 IVR Builder application.

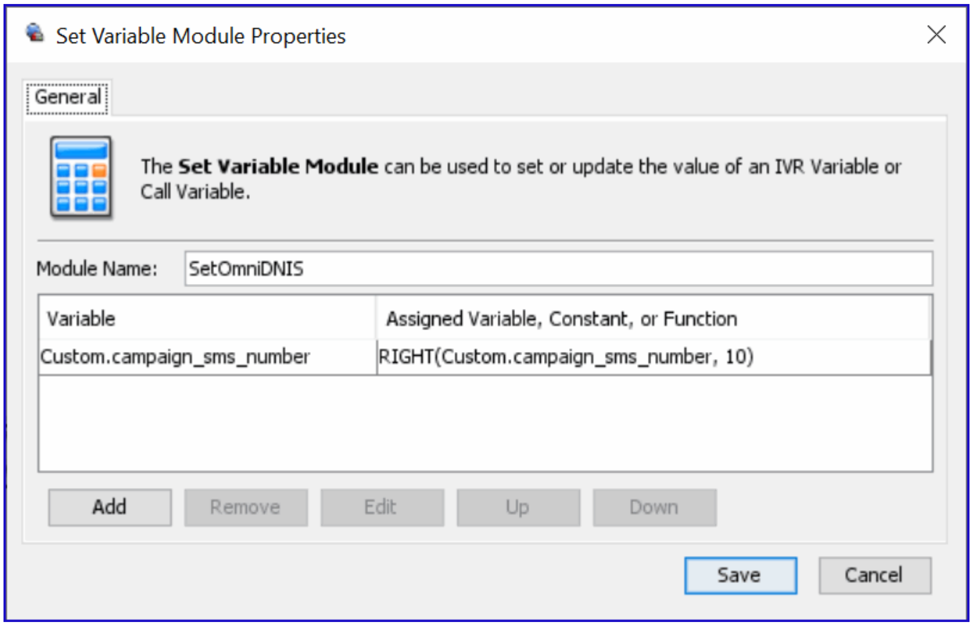
Note
Unassigned SMS messages are closed automatically after one week or seven calendar days.

To segment SMS messages and route them to a specific agent, follow these steps.

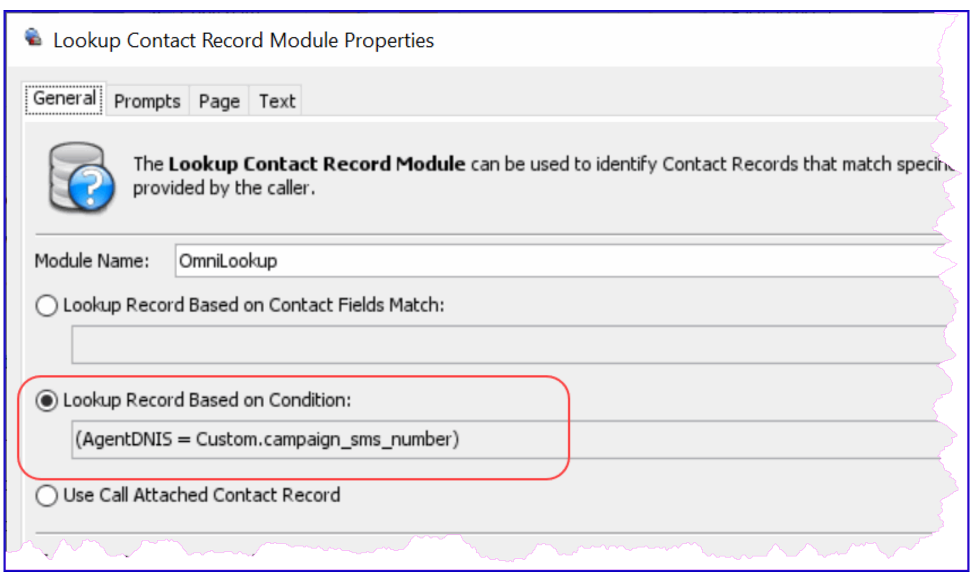
1 Configure an IVR **If/Else** module to separate inbound SMS from inbound voice, such as identifying a null DNIS.



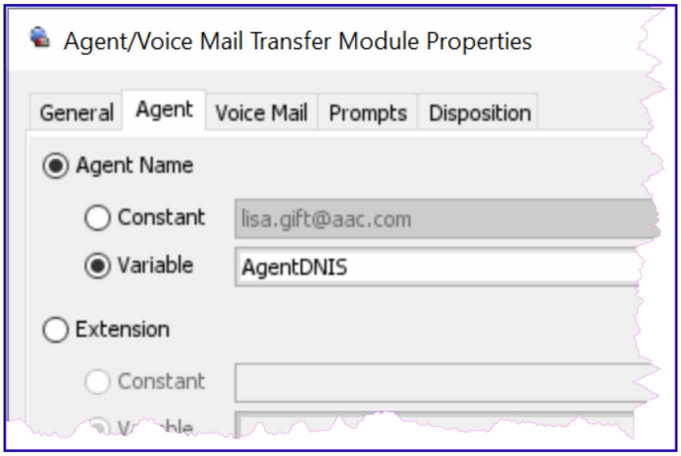
2 Populate the `Custom.campaign_sms_number` variable using an IVR **Set Variable** module.



3 Use an IVR **Lookup Contact Record** module to associate a specific variable that you define, such as **AgentDNIS**, and have identified to receive these incoming SMS messages.



4 Configure an IVR **Agent/Voicemail Transfer** module to route the interaction using the **AgentDNIS** variable.



SMS Segmentation and Billing

SMS usage billing is based on the number of segments in a message. SMS service providers segment SMS messages based on the number of characters in a message, and count each segment within a message as a single unit. If an SMS message contains 200 characters, it is counted as two SMS messages: one containing 160 characters (maximum per segment), and one containing 40 characters. Character encoding type affects how the number of characters are counted. A message containing special (Unicode or non-GSM) characters are counted as additional segments. For example, the following message contains 206 characters and is billed as four segments.

```
"Name, you are considering school, that’s great! We will
reach out to you later from this phone number (4087897938)
to discuss more about our University. Our next start date
is right around the corner!".
```

The apostrophe in “that’s” and the two parentheses in “(4087897938)” result in the additional segments.

The number of segments in your messages may impact your billing. Contact your account team for more information.

Keywords

A keyword is a unique word or phrase that customers or subscribers can send to your 10DLC, TFN, or short code number to subscribe or unsubscribe from future text messages. You can create multiple keyword definitions to suit different purposes.

Example

Text “JOIN” to 54327 to subscribe to alerts and deals.

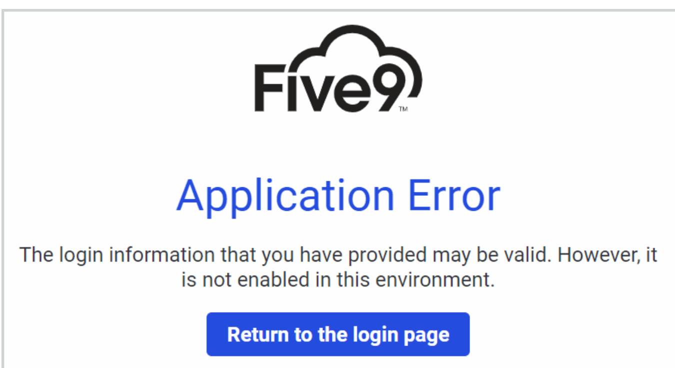
By default, Five9 automatically handles standard English-language reply messages such as STOP, UNSUBSCRIBE, JOIN, or CANCEL for 10DLC and long-code numbers, following industry standards. These keywords trigger predefined replies that you can customize.

Logging In

You use the Five9 Administrator Console to log into your Five9 account and access Keywords.

1. Enter the URL that applies to your location.
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/
2. Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



Note: If you don't see the Keywords card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

Permissions and Permission Sets

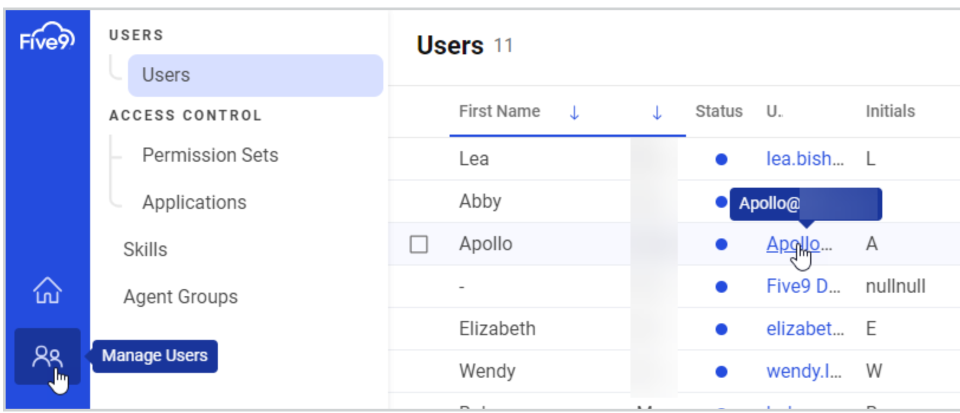
Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view the **Keywords** card in Admin Console.

> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

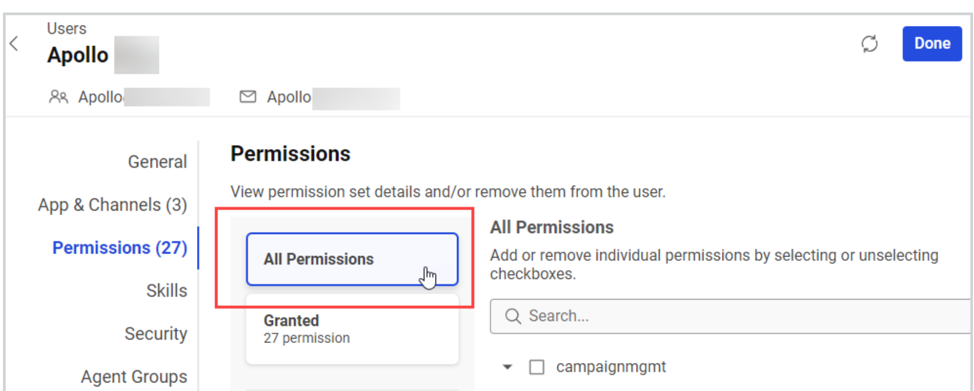
Assigning Permission Sets

1 Select **Users** on the Admin Console home page.

2 Select the user hyperlink on the Users page.



3 Select the **Permissions** tab and select **All Permissions**.



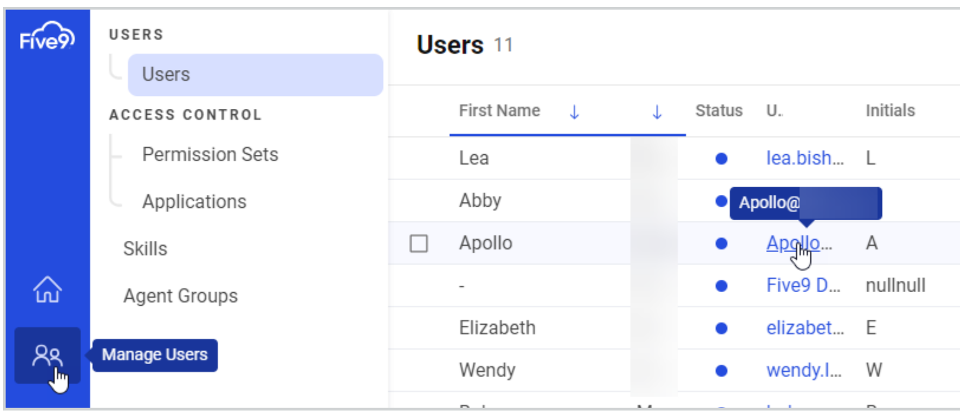
4 Type the permission group name from the table in [Keywords](#) into the search field or scroll the list to the permission group, and select the desired permissions or group.

5 Select **Done**.

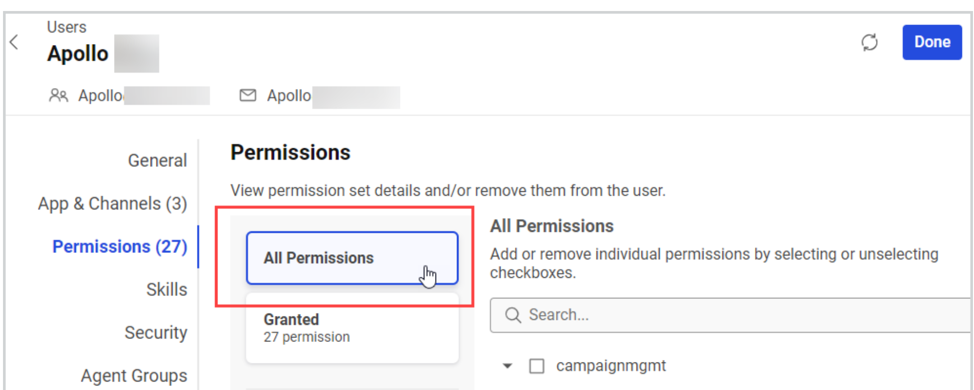
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select **All Permissions**.



3 Type the permission group name from the table in **Keywords** into the search field or scroll the list to the permission group, and select the desired permissions or group.

4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

Keywords Permissions

This section presents the individual user permissions required to view the **Keywords** card on the Admin Console home page and access the described features. The **Keywords** permissions are:

Group	Subset	Permission	Description
digital	**keywords**	**Delete Keywords**	User can view and delete keywords to prompt an automated action, when managing a digital campaign.
		View Keywords	User can view keywords to prompt an automated action, when managing a digital campaign.
		Create Keywords	User can create keywords to prompt an automated action, when managing a digital campaign.
		Edit Keywords	User can view and edit keywords to prompt an automated action, when managing a digital campaign.

Creating Opt-Out Keywords

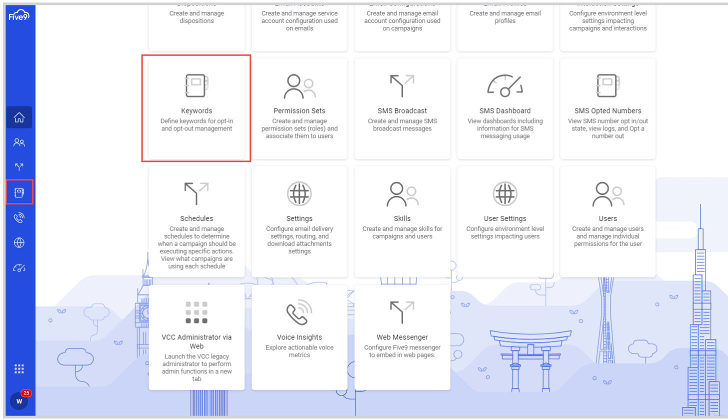
When a recipient replies with STOP, UNSUBSCRIBE, or any defined keyword to stop messages, they no longer receive texts from your organization.

As the sender, you cannot send messages to the customer on this campaign. The customer must opt in by sending a message to the 10DLC, TFN, or shortcode number associated with the campaign.

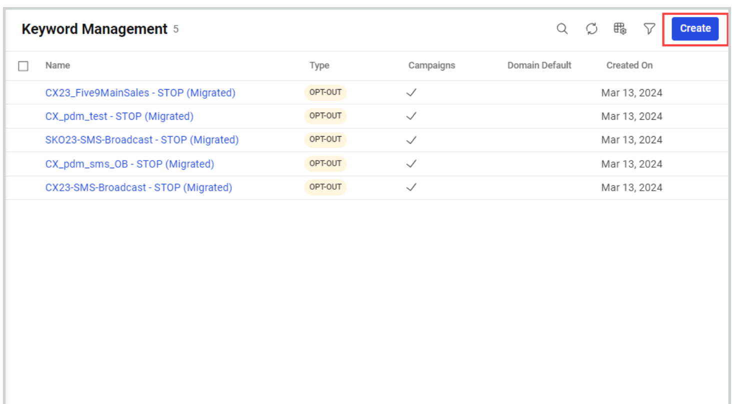
By default, Five9 processes standard English-language replies such as STOP, UNSTOP, UNSUBSCRIBE, or CANCEL for toll-free and long-code messages. These keywords trigger automatic responses based on industry standards.

To create a new Opt-Out keyword:

1. Ensure that you have the required permissions.
2. Select the **Keywords** card or the **Manage Contacts and Lists** icon in the sidebar navigation.



3 On the Keyword Management page, select **Create**.



4 If required, toggle **Default for Domain** to apply the keyword definition across the entire domain.

5 Select the **Opt-Out** Category.

6 Choose a **Message Frequency** option:

Always: Sends a response for every opt-out keyword reply.

First Only: Sends a response only for the initial opt-out message.

Never: Does not send any response when a recipient opts out.

7 Enter the required **Keywords**.

8 Enter the **Opt-Out Message** to be sent to unsubscribed recipients.

Example opt-out messages:

- **Your-Company-Name:** You have opted out and will no longer receive messages from this service. To resubscribe, reply UNSTOP.
- You have successfully unsubscribed from **Company-name**. You will not receive any more notifications from us. Reply UNSTOP to resubscribe.
- **Company-Name:** You have been opted out and will not receive any further messages.

9 Enter the **Confirmation Message** that confirms the recipient's choice.

> **Note**
>
> When a recipient replies STOP to a message, they will still receive phone calls from the same number—the STOP command only applies to SMS/MMS messages. If users send an SMS to the same number and campaign later, they are opted back in, equivalent to sending an UNSTOP message. As the sender, you can then resume sending messages to the customer.

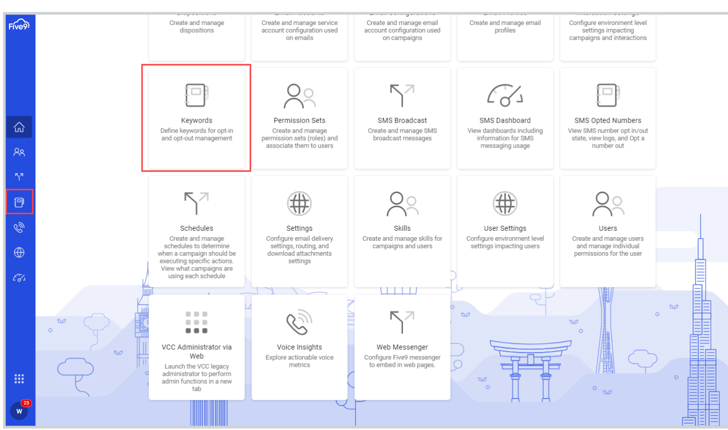
Creating Opt-In Keywords

To receive messages from a business, a consumer must first give their consent by opting in. The Opt-In Keyword definition enables the admin to specify how a consumer can provide this consent.

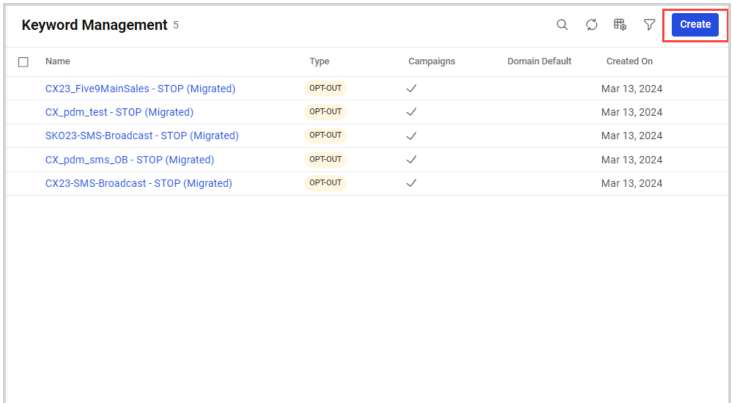
To create a new Opt-In keyword:

1 Ensure that you have the required permissions.

2 Select the **Keywords** card or the **Manage Contacts and Lists** icon in the sidebar navigation.



3 On the Keyword Management page, select **Create**.



4 If required, toggle **Default for Domain** to apply the keyword definition across the entire domain.

5 Select the **Opt-In** Category.

6 Enter the relevant keywords, such as "YES," "IN," or other business-specific terms. Customize these keywords in multiple languages with Opt-In messages tailored to your customers.

The Opt-In Keyword definition allows administrators to specify how consumers can give their consent. Methods include:

- **Customer Relationship:** Use an existing customer relationship to qualify for opt-in based on prior consent.
- **Verbal Consent:** Obtain consumer consent verbally, either through an agent or an IVR system.
- **Web Form:** Collect consent when consumers provide their phone number on your business website.
- **Public Source:** Use a consumer's number obtained from a public source where it was freely provided.
- **Point-of-Sale (POS) Signup:** Allow consumers to sign up for messages through an on-site POS system or other message senders.
- **Advertising Keyword:** Enable consumers to opt in by sending an advertising keyword to your company.

7 Create the **Opt-In Message** that consumers will receive after subscribing. Ensure the response includes your brand name, confirmation of the subscription, instructions for seeking help, and clear instructions on how to unsubscribe (Opt-Out).

8 Enter the **Confirmation Message** that confirms the recipient's choice. Examples include:

   - "You are now subscribed to [Company-Name]. Message frequency varies. To get help, reply HELP. To unsubscribe, reply STOP."
   - "Welcome to [Company-Name]. You will start receiving text messages. For assistance, reply HELP. To unsubscribe, reply STOP."
   - "[Company-Name]: Reply YES to subscribe to mobile alerts. You will receive periodic messages. Text HELP for help. Text STOP to unsubscribe."

   Note

   After receiving a message, recipients can respond with one of three text commands: STOP, UNSTOP, or HELP. Note that these commands do not apply to Toll-Free Numbers (TFNs).

Creating Help Keywords

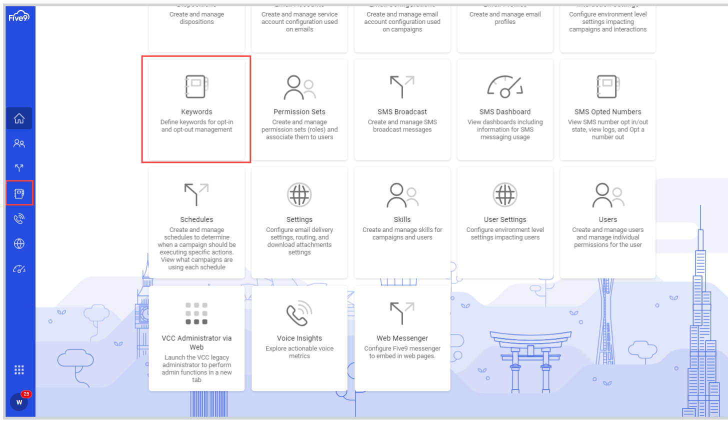
When users respond with the HELP command, they receive an automated message with the main contact number for further assistance. You can customize this message to fit your organization’s needs.

HELP keywords should generally provide useful information, such as how to opt out. If you customize the HELP message, we recommend including your business name in the response.

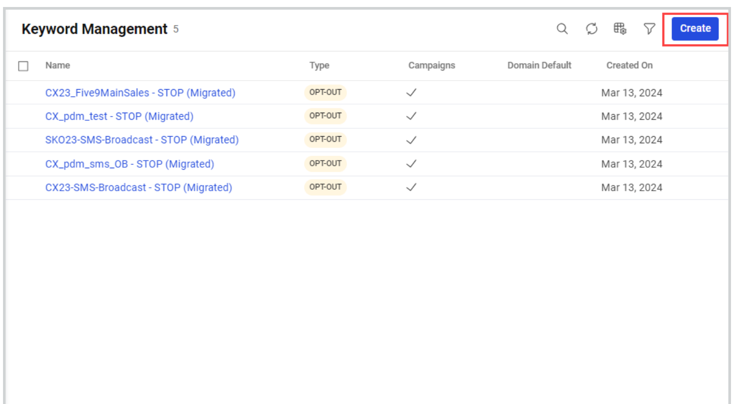
To create a new Help keyword:

1 Ensure that you have the required permissions.

2 Select the **Keywords** card or the **Manage Contacts and Lists** icon in the sidebar navigation.



3 On the Keyword Management page, select **Create**.


Keyword Management 5

Create

Name	Type	Campaigns	Domain Default	Created On
CX23_Five9MainSales - STOP (Migrated)	OPT-OUT	✓		Mar 13, 2024
CX_pdm_test - STOP (Migrated)	OPT-OUT	✓		Mar 13, 2024
SKO23-SMS-Broadcast - STOP (Migrated)	OPT-OUT	✓		Mar 13, 2024
CX_pdm_sms_OB - STOP (Migrated)	OPT-OUT	✓		Mar 13, 2024
CX23-SMS-Broadcast - STOP (Migrated)	OPT-OUT	✓		Mar 13, 2024

4 Select the **Help** Category.

5 Enter the required **Keywords**.

6 Enter a Help Message

7 Enter the **Help Message.** This is the initial message sent to a recipient in response to the HELP command. Examples include:

- "This is [Org Name]. If you have any questions, please visit our website. For further assistance, type HELP. Send STOP to unsubscribe.
- "[Org Name]: For help, email us at sales@orgname.com. To unsubscribe, reply STOP."

- "Welcome to [Org Name]. Reply with HELP for more information. Send END to unsubscribe."

Responses

Unstop

Customers who change their minds and want to opt in again can reply with the UNSTOP message. This opts them back in to receive messages from your organization, allowing you to send messages again.

Note

Standard messaging fees apply to the initial inbound STOP, START, HELP, or INFO message sent to your Five9 number, just like any other inbound SMS message. However, there are no additional fees for the blocklist changes triggered by these keywords, and no cost for the automatic reply to the sender.

Notice

Text message campaigns may be subject to various legal compliance requirements based on the nature of your campaign, the origin of your text messages, and the location of your recipients. While Five9 manages the messages described on long codes and Toll-Free numbers outlined in this article, you should consult your legal counsel to ensure your campaign complies with all applicable legal requirements. For further questions, please contact Five9 Support.

SMS Broadcast

The SMS Broadcast feature enables users to send SMS campaigns to multiple recipients through the chat console interface. The Administrator Console home page provides access to the SMS Broadcast section, displaying a list of previously delivered and failed broadcasts. Users can create a new SMS broadcast by selecting a campaign, specifying contacts either manually or via CSV file, composing the message, and scheduling the broadcast. This feature streamlines the process of reaching large audiences with targeted SMS communications.

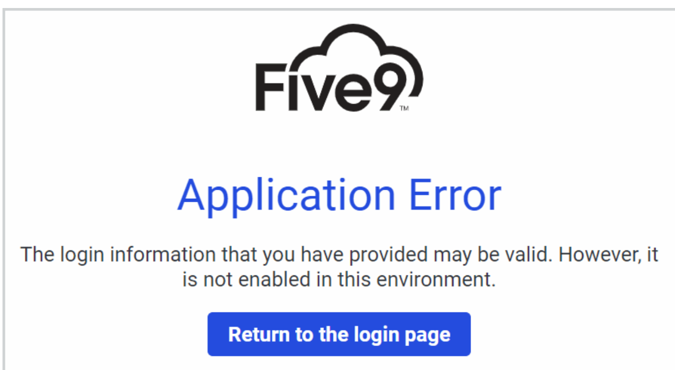
Logging In

You use the Five9 Administrator Console to log into your Five9 account and access SMS Broadcast.

1 Log in to the Five9 Admin Console here:
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/

2 Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



> **Note:** If you don't see the **SMS Broadcast** card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

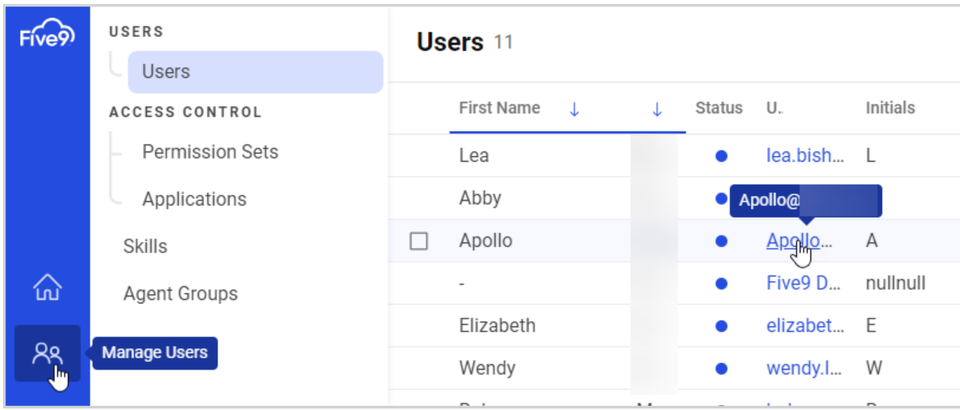
Permissions and Permission Sets

Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view the **SMS Broadcast** card in Admin Console.

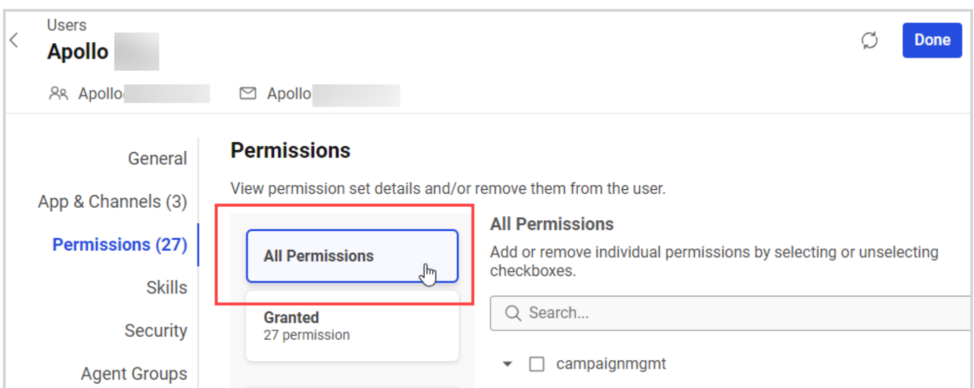
> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

Assigning Permission Sets

1. Select **Users** on the Admin Console home page.
2. Select the user hyperlink on the Users page.



3. Select the Permissions tab and select **All Permissions**.

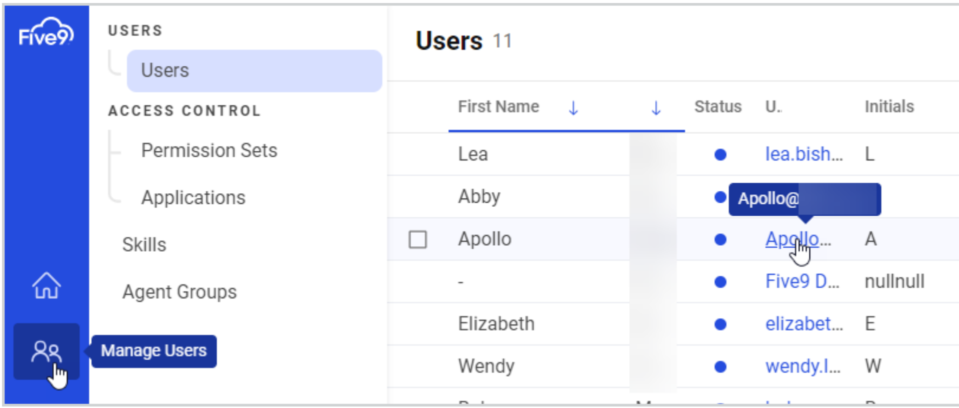


4. Type the permission group name from the table in [Permissions and Permission Sets]() into the search field or scroll the list to the permission group, and select the desired permissions or group.
5. Select **Done**.

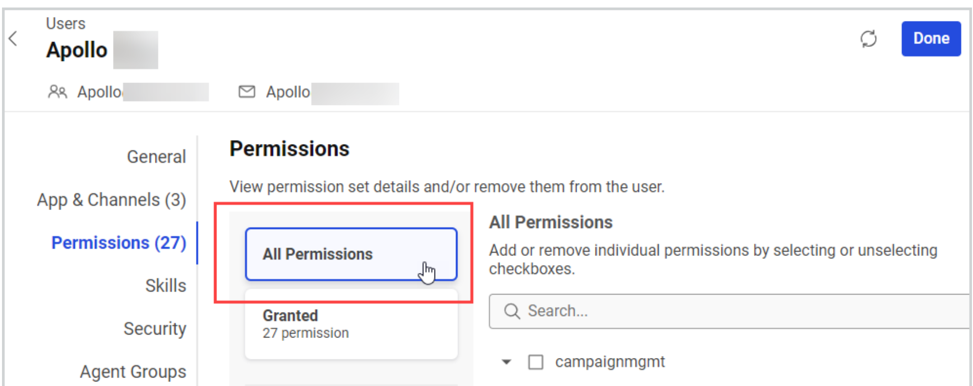
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

1 Select the user hyperlink on the Users page.



2 Select the Permissions tab and select **All Permissions**.



3 Type the permission group name from the table in [Permissions and Permission Sets] into the search field or scroll the list to the permission group, and select the desired permissions or group.

4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

SMS Broadcast Permissions

This section presents the individual user permissions required to view the SMS Broadcast card on the Admin Console home page and access the described features. The SMS Broadcast permissions are:

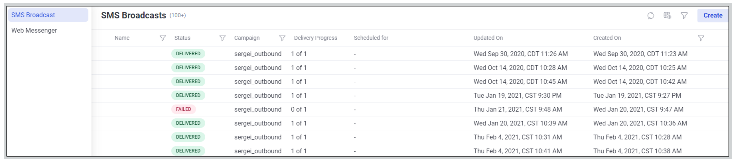
Group	Subset	Permission	Description
sms	**broadcast**	**View bulk SMS Broadcasts**	**Required**: View existing SMS broadcasts. Without this permission, the user cannot see the **SMS Broadcast** card in Admin Console.
		Cancel bulk SMS Broadcasts	Cancel SMS broadcasts.
		Create bulk SMS Broadcasts	Create SMS broadcasts.
		Delete bulk SMS Broadcasts	Delete SMS broadcasts.
	opt-in	**View SMS Opt-in List**	View the SMS opt-in list.
		Edit SMS Opt-in List	Edit the SMS opt-in list.

Creating a New SMS Broadcast

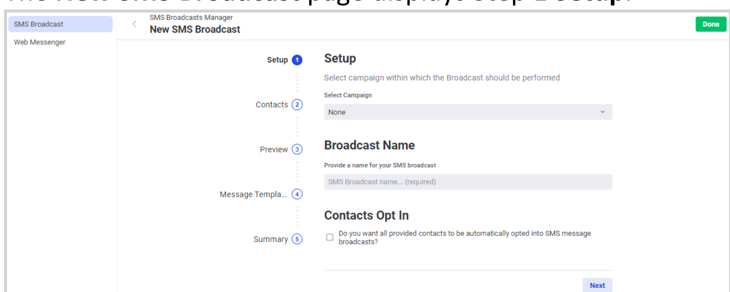
Upon successful login, you are presented with the Administrator Console home page.

1 Select the **SMS Broadcast** card.

2 The **SMS Broadcast** page opens and displays a list of previously Delivered and Failed broadcasts.



3 Select **Create**.
The **New SMS Broadcast** page displays Step 1 **Setup**.

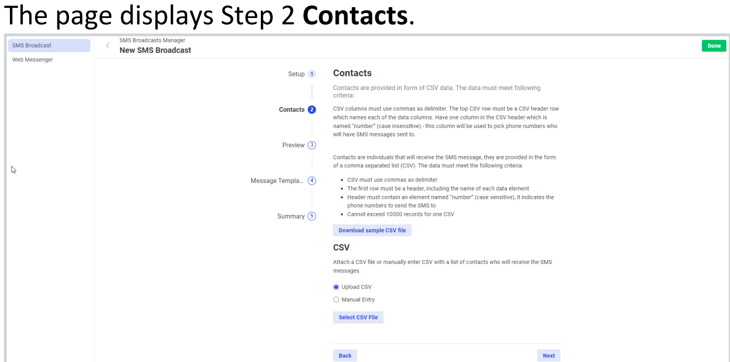


4 Select a campaign from the **Select Campaign** drop-down list.

5 Type a name for your broadcast.

6 (Optional) Select the checkbox under **Contacts Opt In** to broadcast your SMS to all of your provided contacts.

7 Select **Next**.
The page displays Step 2 **Contacts**.



- (Optional) If you need to view or use a sample CSV file, click **Download sample CSV file**.
  A CSV file downloads locally.

- (Optional) Open the CSV file by navigating to your download location from File Explorer or the browser. The CSV file contains sample data.

	A	B	C	D	E
1	number	contact.firstName	contact.lastName	contact.email	variable
2	2124567890	John	Doe	johndoe@five9.com	sample variable value

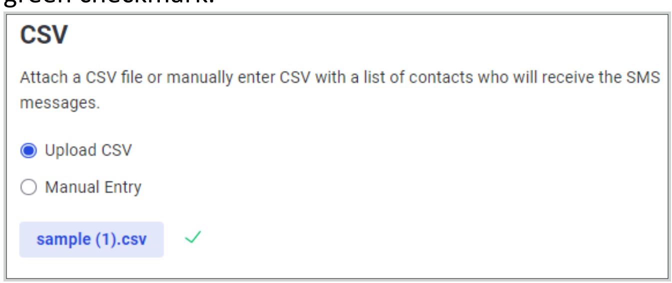
8 You can include contact information by typing it manually in the chat console or you can upload a CSV file.

To upload contacts using a CSV file:

a Select **Upload CSV**.

b Select **Select CSV File**.

c Navigate to the CSV file you want to upload, and select the file name. Select **Open**.
The CSV File is attached and appears in place of Select CSV File with a green checkmark.

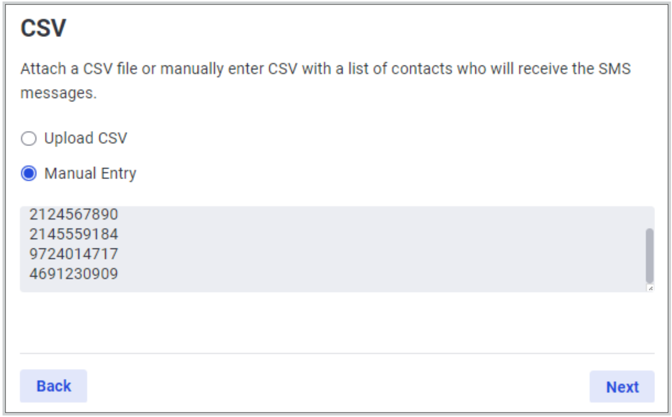


> **Note:** There is a limit of 10,000 records when you send a single broadcast using CSV. If you want to send to more than 10,000 contacts using CSV, you can schedule multiple broadcasts at the same time using different CSV files. For example if you want to send to 100,000 contacts at 9am, you can schedule 10 broadcasts at 9am, with each CSV files containing 10,000 records.

To upload contacts using **Manual Entry**:

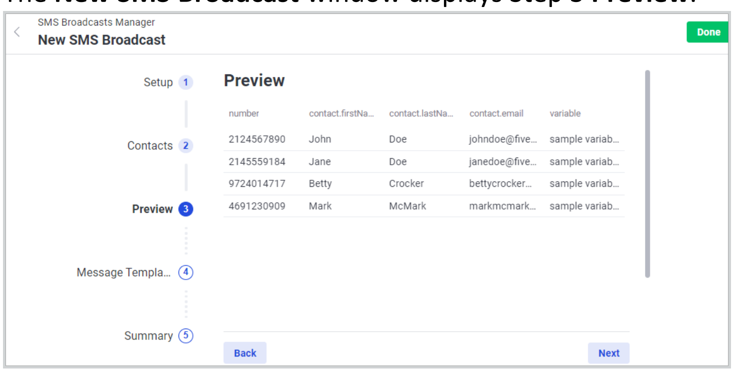
a Select **Manual Entry**.

b Copy and paste the phone number data from your CSV file into the text box.



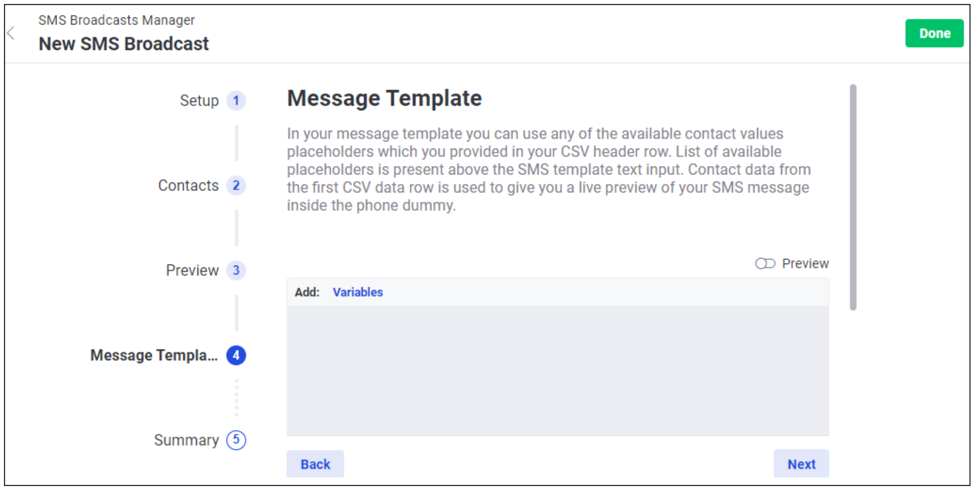
9 Select **Next**.

The **New SMS Broadcast** window displays Step 3 **Preview**.



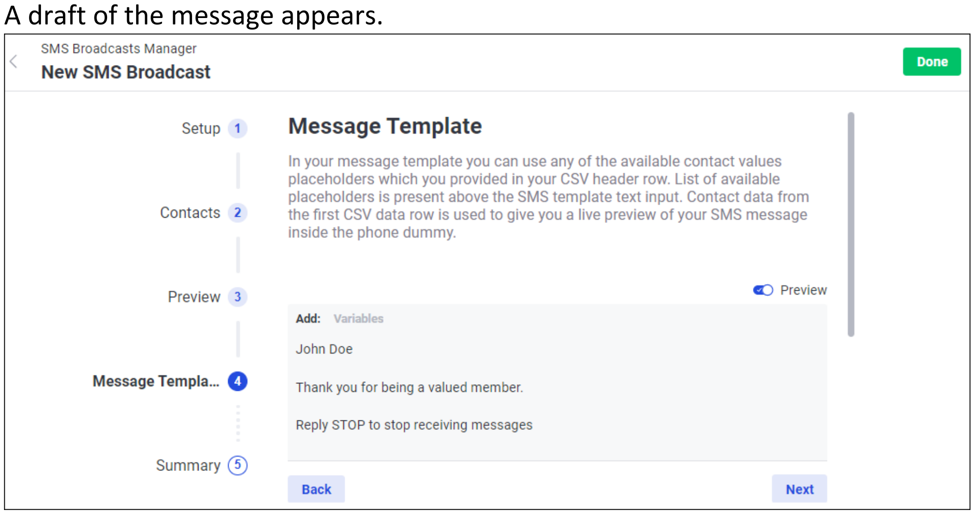
10 Click **Next**.

11 The **New SMS Broadcast** window displays Step 4 **Message Template.**

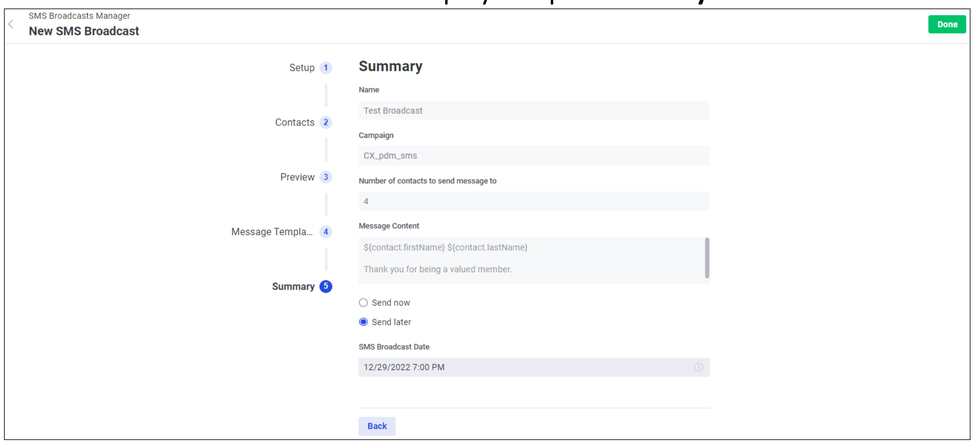


12 Select the **Variables** you included manually or in your CSV file from the drop-down list to add them to your SMS.

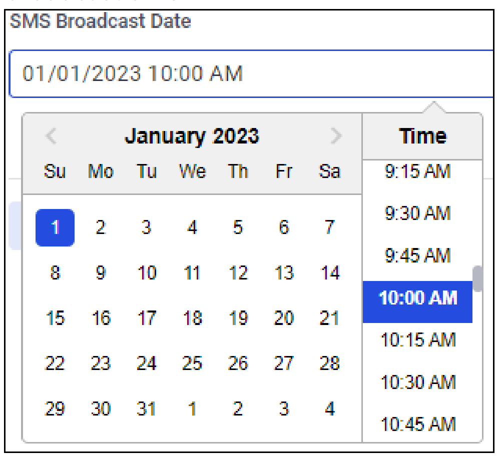
13 Type the desired text for your SMS and toggle **Preview**.
A draft of the message appears.



14 Select **Next**.
The **New SMS Broadcast** window displays Step 5 **Summary**.



15 Review your SMS details and select if you want to send the broadcast now or later. Selecting **Send Later** enables you to schedule a date and time for the broadcast SMS.



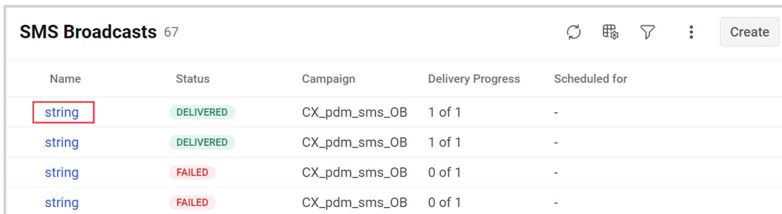
16 Click **Done**.

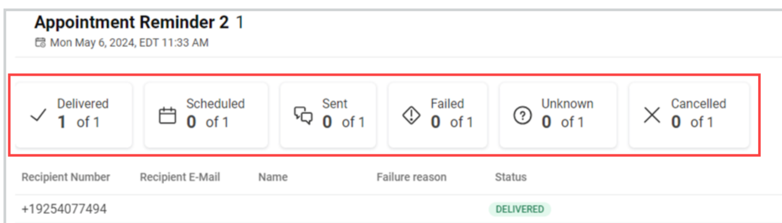
Note

You can export all records from a campaign after it has ended. Export options include CSV format and Excel file. You can also schedule the export for a specific future date and time.

Broadcast SMS Panel

The Broadcast SMS Panel allows you to monitor the status of your broadcast messages. By selecting a specific broadcast from the list on the SMS Broadcasts page, you can review the delivery status of messages, including those that have been successfully delivered or failed. This feature provides a comprehensive overview, enabling you to track the performance of your SMS campaigns.





Delivered: Monitors the delivery status of SMS messages to ensure they reach intended recipients. These metrics are crucial for organizations to verify successful message delivery.

Scheduled: Shows the number of messages scheduled for sending at a specified date and time.

Sent: Represents the total number of messages initiated via our SEND SMS API. This metric indicates the total number of messages sent, not whether they reached end-user devices.

Failed: Indicates the total number of messages that could not be delivered. Reasons include the recipient's phone being off, out of service area, or the number being incorrect or inactive.

Unknown: Represents the total number of SMS messages for which the delivery status is unconfirmed. This may occur due to factors like network disruptions, carrier limitations, or system errors, preventing confirmation of message receipt.

Canceled: Refers to the total number of SMS messages not sent because they were halted or stopped before delivery. This could occur due to sender intervention or system processes, indicating that the message was never delivered to the recipient's device. Resending may be necessary if the message is still required.

Registering SMS 10DLC and TFN

US Mobile Network Operators (MNOs) have implemented policies to decrease spam and phishing application-to-person (A2P) messages sent from 10DLC numbers. To comply with these policies, you must register your SMS-enabled numbers with a central registration system. This process varies depending on the type of your SMS-enabled numbers. There are two types of SMS-enabled numbers:

- 10DLC is a 10-digit long code that allows businesses to send messages to customers through standard (local) phone numbers.
- TFN is a 10-digit toll-free number that begins with an 800, 888, 877, 866, 855, 844, or 833 area code, and allows businesses to send messages to customers through national numbers.

This content guides you through Five9's 10DLC brands and campaigns (use cases) registration process in Administrator Console (Admin Console). You must register TFN separately. See Toll-Free Verification for details and FAQs on TFN registration.

Verifying your TFN

To verify your TFN with Five9:

1. Download the TFN Verification Form.
2. Complete the form and send it to smsregistration@five9.com

Note

The content in this topic refers to use case campaigns, which are not associated with VCC configured campaigns.

To register your 10DLC SMS-enabled numbers in Admin Console, you need to follow **Creating a 10DLC Brand** **Creating a 10DLC Campaign**, and then associate the brand with the campaign. A 10DLC brand is the entity from which you are sending the SMS. Brand registration is required for compliance and is usually done per EIN. A 10DLC campaign is based on the standard or special type use case of messages you are sending.

Five9 Admin Console Permissions

Permissions and permission sets in the Admin Console, allow you to control the functions or features users can perform. To configure 10DLC brands and campaigns, you must have the required campaign management registry permissions in the Five9 Admin Console. While editing a user record in Admin Console, go to **Permissions** > **All Permissions** > **campaignmgmt** > **registry** and select the permission. The available permissions are:

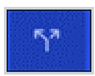
Permission	**Allows user to...**
View campaign registrations details for SMS 10DLC brands	**Required:** View 10DLC brands and 10DLC campaigns. Without this permission, the user cannot see the **10DLC Brand Registration** and **10DLC Campaign Registration** cards in Admin Console.
Create campaign registrations details for SMS 10DLC brands	Create 10DLC brands and 10DLC campaigns.
Delete campaign registrations for SMS 10DLC brands	Delete 10DLC brands and 10DLC campaigns.
Edit campaign registrations details for SMS 10DLC brands	Edit 10DLC brands and 10DLC campaigns.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

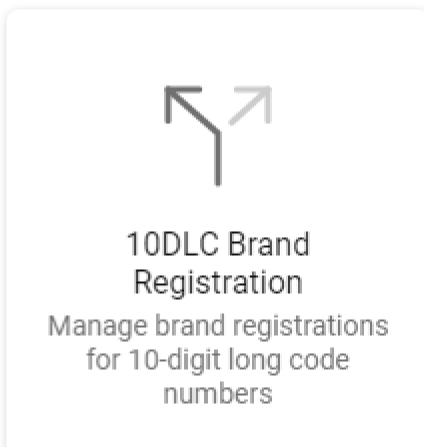
Creating a 10DLC Brand

A 10DLC brand provides the MNO with general and contact information about the entity that will send A2P messages in the 10DLC campaign. Follow these steps to create a 10DLC brand.

1. In Admin Console, click the **Manage Campaigns** icon in the sidebar. For help logging into Admin Console, see the **Logging In** section in the Administrator Console Administrators Guide.

   You can also click on the **10DLC Brand Registration** card on the Admin Console home page.

2. Click **10DLC Brands** and then click **Create Brand**.

3. Enter the information in the **General** section.

   This table describes the **General** information requested for 10DLC brand registration. Fields are required unless otherwise noted.

Field name	Description
Legal Company Name	Legally registered company name. This is displayed in the header of the EIN confirmation letter from IRS.

Brand Name	Trade name for the entity of the business sending the SMS. This is usually the same as the legal company name.
Entity Type	Legal type of the organization.
Tax Number/ID/EIN	Unique 9-digit number assigned to a business. This is displayed in the header of the EIN confirmation letter from IRS.
Vertical	Line of business.
Stock Symbol	**Optionally required** If entity is a publicly traded company, stock symbol and stock exchange are required. Abbreviation that refers to a company's share listed on stock exchanges.
Stock Exchange	**Optionally required** Stock exchange where assets corresponding to stock symbol are listed.

After you complete the **General** section, click **Next**.

4 Enter the address and provide the website address in the **Contact** section.

5 Click **Done**. It may take several minutes to save and display the new brand.

10DLC Brands (2)

Brand Name	Legal Company Name	Type	Registered	Country	Status
test	test	Private Company	1/31/2023	US	Unverified
Five9 Inc	Five9 Inc	Publicly Traded Company	1/24/2023	US	Verified

You can filter on **Company Name** or **Type**. **Status** indicates the state of the the brand registration. When you first create the brand, the status shows as "-", and the status changes throughout the registration process. The possible status are:

- **- <blank>**: Brand registration is pending a response from the central registration process. It may take several minutes to receive a response.
- **Verified**: Brand registration is complete. The status must be in the Verified state to associate it with a 10DLC campaign.
- **Unverified**: You need to review the details you have provided in the brand

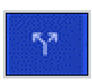
registration. The common causes for an **Unverified** status response registration are:

- **Tax Number/ID/EIN doesn't match the legal company name or business type.** Confirm that the number you entered matches with the identification number that the IRS has assigned to your business for tax purposes.
- **Stock symbol is incorrect.** If your business is a publicly traded company, confirm that the stock ticker symbol is correct and the stock exchange matches the legal company name. The stock symbol and stock exchange are only required if you selected the publicly traded company entity type.

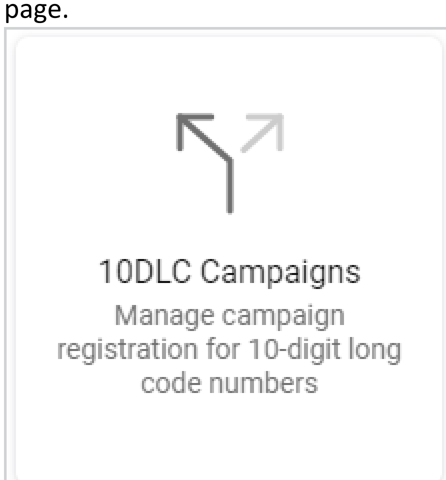
Creating a 10DLC Campaign

A 10DLC campaign provides the MNO with information on the types of A2P messages that will be sent in the campaign associated with the 10DLC brand. Follow these steps to create a 10DLC campaign.

1. In Admin Console, click the **Manage Campaigns** icon in the sidebar. For help logging into Admin Console, see the **Logging In** section in the Administrator Console Administrators Guide.

   You can also click on the **10DLC Campaigns** card on the Admin Console home page.

2. Click **10DLC Campaigns**, and then click **Create Campaign Registry**.

3 Enter the information in the **Campaign Details** section.

This table describes the **Campaign Details** requested for 10DLC campaign registration. Fields are required unless otherwise noted.

Field name	Description
Campaign Description	Brief description of campaign use case.
Call-to-action/message flow	Describes how consumer gives consent to receive messages from the brand. Must be explicitly clear and inform the consumer of the nature of the program.
Entity type	Legal type of the organization.
Brand	10DLC brand to associate the 10DLC campaign. **Important**: You can only save a campaign that is associated with a verified brand.
Use Case	Use case for sending messages. Refer to the **Description of Use Cases** section that follows for details about use case types.

Description of Use Cases

The use cases you are required to associate with your campaign are categorized as standard or special. The following section and tables describes the two types.

Standard Use Cases

Standard use cases are automatically approved.

Use Case Type	Description
2FA	Any authentication, verification, or one-time passcode.
Account Notifications	Standard notifications for account holders, relating to and being about an account.
Customer Care	All customer care interaction, including but not limited to account management and customer support.
Delivery Notifications	Notification about the status of the delivery of a product or service.
Fraud Alert Messaging	Notifications regarding potential fraudulent activity on a user's account.

Higher Education	Messaging created on behalf of colleges or universities, including school districts and educational institutions. This use case is NOT for the "free to the consumer" messaging model.
Low Volume Mixed	For brands that have multiple use cases and only need low messaging throughput. Examples include: test or demo accounts, small businesses (single doctor's office, single pizza shop, etc.)
Marketing	Any communication that includes marketing and/or promotional content.
Mixed	Any messaging campaign containing two to five standard use cases.
Polling and voting	The sending of surveys and polling/voting campaigns.
Public Service Announcement	Informational messaging to raise an audience's awareness about important issues.
Security Alert	Notification that the security of a system, either software or hardware, has been compromised in some way and there is an action you need to take.

Special Use Cases

Special use cases may require additional vetting to complete the campaign registration. If you need assistance on special use cases, please contact customer support.

Use Case Type	Description
Carrier Exemptions	Exemption by carrier.
Charity	Communications from a registered charity aimed at providing help and raising money for those in need. 501c3 tax-exempt organizations only.
Proxy	Peer-to-peer, app-based group messaging with proxy/pooled numbers. Supporting personalized services and non-exposure of personal numbers for enterprise or A2P communications.
Emergency	Notification services designed to support public safety/health during natural disasters, armed conflicts, pandemics, and other national or regional emergencies.

K-12 Education	Campaigns created for messaging platforms that support schools from grades K-12, and distance learning centers. This is not for post-secondary schools.
Sweepstakes	All sweepstakes messaging.
Political	Part of an organized effort to influence decision making of a specific group. Available only to registered 501(c)(4/5/6) and organizations with a Campaign Verify Token or Aegis Political Vetting.
Social	Communication between public figures/influencers and their communities. Examples include: YouTube Influencers' alerts or Celebrity alerts.
Platform Free Trial	Platform free trial offers with strict controls and MNO audit rights (MNO opt -n).
UCaaS Low Volume	UCaaS companies provide cloud delivered communication services for businesses. Each number assigned to a UCaaS campaign is typically assigned to a different employee of that business and the use cases are varied. This use case is not for API/automated driven communication, and is only available to approved UCaaS businesses. It has the same volume restrictions as the Low Volume Mixed standard campaign type.
UCaaS High Volume	UCaaS companies provide cloud-delivered communication services for businesses. Each number assigned to a UCaaS campaign is typically assigned to a different employee of that business and the use cases are varied. This use case is not for API/automated driven communication, and is only available to approved UCaaS businesses. It is for UCaaS campaigns that require higher volume.
Agents and Franchises	Brands that have multiple agents, franchises or offices in the same brand vertical, but require individual, localized numbers per agent/location/office.

After you complete the **Campaign Details** section, click **Attributes**.

4 Select the attributes that apply to the 10DLC campaign.

This table describes the possible **Attributes**. Required fields are indicated.

Field name	Definition
Subscriber Opt-in	**Required** Indicates whether the campaign is collecting and processing consumer opt ins.
Opt-in keywords	Indicates the keyword the customer can use to opt in.
Opt-in message	Message received by customer once they are opted in.
Subscriber Opt-out	**Required** Indicates whether the campaign is collecting and processing consumer opt out.
Opt-out keywords	Indicates the keyword the customer can use to opt out.
Opt-out message	Message informing customer how to opt out.
Subscriber Help	**Required** Indicates whether the campaign has implemented message reply to inform customers how to contact the message sender after they reply with the “HELP” keyword.
Help Keywords	Indicates the keyword the customer can use to ask for help.
Help Message	Message informing the customer how to ask for help.
Number pooling	Indicates if you are planning to add more than 49 numbers in the campaign. If you wish to add more than 49 numbers to the same 10DLC campaign, you need to submit a request. Provide the additional information in the Five9 10DLC Campaign Number Pooling form and send it to smsregistration@five9.com. This is a manual process and may take several weeks. **Important**: Selecting the Number Pooling checkbox DOES NOT constitute a sub ID approval. You must still complete the Five9 10DLC Campaign Number Pooling form.
Embedded phone number	Indicates if messages contain an embedded phone number.
Age-gated content	Indicates if messages contain age-gated content.
Embedded link	Indicates if messages contain an embedded link.
Direct lending or	Indicates if messages include content related to direct

Loan agreement	lending or loan agreements.
CTIA Terms and condition	**Required** Indicates if you agree with CTIA terms and conditions.

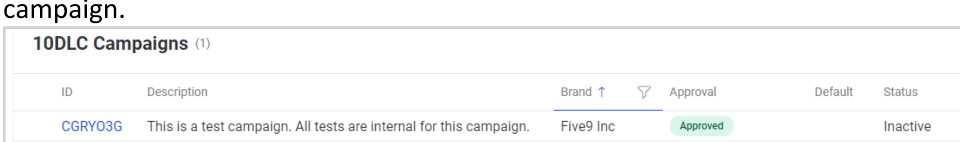
After you complete the **Attributes** section, click **Sample Messages**.

5 Enter the message content for the messages in the **Sample Messages** section. You must provide at least two sample messages.

After you complete the **Sample Messages** section, click **Carrier Terms**.

6 The **Carrier Terms** section displays campaign qualification status and terms of each MNO. This is informational only, and no action is needed in this section.

7 Click **Done** to complete the 10DLC campaign registration and display the new campaign.



After you create the 10DLC campaign, manual vetting is done by aggregators. The vetting process may take five business days or more to be completed. Once complete, the DIDs on your account are automatically associated to the default 10DLC campaign. Click the 10DLC campaign ID then click the **Numbers** tab to view the registered DIDs.

10DLC Vetting Tips and Guidelines

Bandwidth's aggregator vets all new 10DLC campaigns to ensure they comply with the wireless carriers' codes of conduct. This section provides clarity and insight to help you register your campaigns successfully and smoothly.

Common Reason for Rejection

- A Call to Action (CTA) that is incomplete or unclear.
- Opt-out messages that are missing or do not comply with guidelines.

- Including prohibited SHAFT-C content.
- Failing to provide a website or online presence.
- Not meeting Know Your Customer (KYC) guidelines.
- Providing inadequate Privacy Policy or Terms and Conditions.
- Incorrectly attributing campaigns or content.
- Issues related to sole proprietor campaigns.

Writing Effective Campaign Descriptions

Your campaign description must clearly explain the purpose of your messages. Address these questions:

- Who are you?
- Who is your target audience?
- Why are you sending these messages?

The purpose of text messages should be aligned to the use-case selected and the Opt-in verbatim published to consumers.

Good example:

"Messages for car dealership customers, including appointment reminders, repair updates, satisfaction follow-ups, online bill payment, and two-way conversations."

Bad example:

"Text messages for our team to communicate with customers and partners."

Why this fails: It does not identify the sender or the communication's purpose.

- Include message frequency in the description.

Creating Sample Messages

Create unique sample messages that show the type of content you will send and clearly demonstrate the interaction. The sample messages should align with the overall campaign description and include the sender's identification, such as a brand or sender name.

- Avoid generic descriptions or messages that obscure the use case and require additional research.
- Include opt-out language in at least one sample message (e.g., “Text STOP to unsubscribe”).
- If you include a phone number or link in any sample message, select the appropriate attributes, such as **Embedded Phone Number** or **Embedded Link**, during campaign registration.

  Good Examples:

  "Hello [Name], your appointment with John’s Car Dealership is on [Date] at [Time]. Reply YES to confirm or NO to reschedule. Thank you!"

  "Hi [Name], this is [Company]. We invite you to visit our booth at [Event]. Register at [Link]. Will you attend this year?"

  Bad Examples:

  "Thanks for your rating on Google. I’ll contact you soon."

  "I received your question and will reply as soon as possible."

Call to Action (CTA)

Incomplete or unclear Calls to Action (CTAs) or Message Flow sections frequently result in campaign rejections. The 10DLC vetting process evaluates the CTA through two key criteria:

1. **CTA/Message Flow Field in Campaign Registration**

   This section must provide a clear and concise description of how users sign up to receive messages. Opt-ins must meet the following requirements:

   - Opt-ins must occur directly between you and the user and cannot involve third parties.
   - Opt-ins must explicitly apply to text messaging and cannot be implied.
   - The opt-in process must remain clear, noticeable, and separate from terms and conditions or other agreements.

Examples of Opt-in Methods:

- **Entering a phone number through a website:**

  > **Example:** Customers visit www.examplewebsite.com, enter their phone number, and check a box agreeing to receive text messages from the brand.

  > **Note:** Always include a direct link to the submission form in the CTA/Message Flow field. Missing this link will result in campaign rejection.

- **Clicking a button on a mobile webpage:**

  > **Example:** Customers click a button to opt in via a mobile webpage.

  > **Note:** Provide a link to the webpage in the CTA/Message Flow field.

- **Sending a message with a keyword:**

  > **Example:** Consumers text START to (111) 222-3333 to opt in.

  > **Important:** Explain how consumers are informed about the keyword. Acceptable methods include:
  >
  > - A webpage link where the keyword is advertised.
  > - A screenshot of the keyword advertisement.

- **Signing up at a point of sale (POS) or on-site location:**

  > **Example:** Customers verbally opt in at a business location. Include a copy of the opt-in script read to customers.

- **Using interactive voice response (IVR):**

  > **Example:** Customers provide consent via an IVR system. Include details of how consent is collected.

2 **CTA Disclosure Shared with Consumers**

The CTA disclosure informs users they are opting in to receive messages. It must include the following details:

- Brand name.
- Types of messages being sent.
- Message frequency disclosure (e.g., “Message frequency varies,” or “2 messages per week”).
- A statement that “Message and data rates may apply.”
- Instructions for HELP (e.g., “Text HELP for support”).
- Instructions for opting out (e.g., “Text STOP to unsubscribe”).
- Links to the Privacy Policy and Terms & Conditions.

Include this information for all opt-in collection methods. Below are examples of various opt-in types:

- **Website/Online Opt-in:**

  "By submitting this form and signing up for texts, you consent to receivdoee marketing messages (e.g., promotions, cart reminders) from [Company Name] at the phone number provided. Consent is not a condition of purchase. Msg frequency varies. Msg & data rates may apply. Unsubscribe at any time by replying STOP or clicking the unsubscribe link. Reply HELP for support. Privacy Policy [link] & Terms [link]."

  > **Note:** Avoid forced opt-ins by making phone numbers optional fields on the website.

- **Keyword Opt-in:**

  "By texting START to [Phone Number], you consent to receive marketing messages from [Company Name]. Consent is not a condition of purchase. Msg frequency varies. Msg & data rates may apply. Unsubscribe at any time by replying STOP. Privacy Policy [link] & Terms [link]."

- **Consumer-Initiated Messaging:**

  "By starting a text conversation with [Company Name] by texting [Phone Number], you agree to receive conversational messages from [Company Name]. Msg frequency varies. Msg & data rates may apply. Unsubscribe at any time by replying STOP. Privacy Policy [link] & Terms [link]."

Verbal Opt-in:

Staff verbally ask customers if they would like to opt in for SMS-based notifications during registration. During this process, customers receive the following information:

- “Message and data rates may apply.”
- “Message frequency may vary.”
- “Text HELP for support or STOP to unsubscribe.”
- Their phone number will not be shared with third parties for marketing or promotional purposes.

Add links to the Privacy Policy and Terms and Conditions in the campaign’s CTA/Message Flow field.

Additional CTA Notes

- Include links to your Privacy Policy and Terms of Use in the CTA.
- Base all messaging traffic on prior opt-in consent.
- If you use a website for opt-ins, provide the website URL in the CTA field. Excluding this information will result in campaign rejection.
- The CTA must reflect donation-related messaging for donation campaigns.
- If you use a website for opt-ins, provide the exact URL in the CTA field where the online form is located. The link must direct users to the correct page. Campaigns will be rejected if the provided URL does not lead to the specific online form or if the home page link is submitted instead of the form page.

> **Example:** "By submitting this form and signing up for texts, you consent to receive marketing, donation requests, and informational messages from [Company Name]. Msg frequency varies. Msg and data rates may apply. Unsubscribe at any time by replying STOP. Privacy Policy [link] & Terms [link]."

Opt-Out Messaging Guidelines

- Use at least one of the following words in your opt-out message: END, STOP, UNSUBSCRIBE, or CANCEL.

- Include spaces between words in opt-out phrases (e.g., "STOP 2 END" is acceptable, but "STOP2END" is not).
- Demonstrate the opt-out process in at least one sample message in your campaign.

> **Example:** "[Business Name:] Your appointment is scheduled for Tuesday at 3:00 PM. Reply YES to confirm, NO to reschedule, or STOP to unsubscribe."

Responding to Opt-Out and HELP Requests

- **Opt-Out Response:**

  When a customer opts out, send a confirmation message that includes your brand name and explicitly states that no further messages will be sent.

  > **Example:** "You have successfully opted out of messages from [Company Name]. You will no longer receive any further communications."

- **HELP Response:**

  When a customer requests HELP, reply with your brand name and include contact details for assistance, such as an email address, phone number, or support website.

  > **Example:** "Thank you for contacting [Company Name]. For support, please call [Phone Number] or email us at [Email Address]. Reply STOP to unsubscribe."

SHAFT-C Content Restrictions

The following types of content are strictly prohibited in 10DLC campaigns and cannot appear on associated websites:

- CBD
- Cannabis
- Sexually explicit material
- Hate speech
- Alcohol*

- Firearms
- Tobacco*

> **Note:** Alcohol and tobacco-related content may be allowed if robust age-gating measures and proper opt-in processes are implemented.

Example of Non-Compliant Content:

> **Example:** If a chiropractor's website features CBD oils, the campaign will be denied, even if the marketing messages are unrelated to CBD.

Online Presence Requirements

- Maintain an accessible website or online presence for your business.
- Aggregators review associated websites during the vetting process. They reject campaigns if they find prohibited content on your website.
- If your business does not have a website, provide an alternative online presence, such as a social media page or Google business listing.
- If you cannot publicly link your Privacy Policy and Terms and Conditions, email these documents to your Five9 representative (TPM, TAM, IM, AM, CSM, or PM) to upload them into the campaign registration portal.

Compliance with Know Your Customer (KYC) Guidelines

Your brand name must accurately reflect the entity sending the messages, not the service provider delivering them.

> **Example:** The Employer Identification Number (EIN) and company details must belong to the message sender (your business), not the service provider (e.g., Five9).

Campaign and Content Attributes

Verify that the following attributes are accurate when setting up your campaign:

- **Subscriber Opt-In:** Include opt-in keywords and make sure the opt-in message provides the following details:
    - Brand name
    - Message frequency disclosure (e.g., "Message frequency varies")
    - "Message and data rates may apply" statement
    - HELP instructions (e.g., "Text HELP for support")
    - STOP instructions

      > **Example:** "Thank you for opting in to receive messages from [Company Name]. Msg frequency varies. Msg and data rates may apply. Reply HELP for help. Reply STOP to cancel."

- **Subscriber Opt-Out:** Provide opt-out keywords and include a message confirming no further messages will be sent.

  > **Example:** "You have successfully opted out of messages from [Company Name]. You will receive no further communications."

- **Subscriber Help:** Include HELP keywords and provide contact information in the response.

  > **Example:** "Thank you for reaching out to [Company Name]. For support, call [Phone Number] or email [Email Address]. Reply STOP to opt-out."

- **Number Pooling:** Select "Yes" if the campaign requires more than 49 phone numbers (TNs).
- **Embedded Content:** If your campaign includes embedded links or phone numbers, indicate this and make sure examples are provided in your sample messages.
- **Age-Gated Content:** Mark "Yes" if the campaign involves age-restricted material.
- **Terms & Conditions:** Make sure these are provided, with links to the document in the appropriate registration field.

Privacy Policy Requirements

Every message sender must provide a compliant Privacy Policy when registering 10DLC campaigns. The policy must clearly outline how the company collects, uses, and manages consumers' mobile numbers. It is critical to detail:

- How consumer data will be used.
- Whether data will be shared with third parties (if applicable).
- How consumers can contact the message sender.

A well-defined Privacy Policy is essential for successful campaign registration and vetting.

Linking Requirements

Include direct links to your Privacy Policy and Terms and Conditions in the Call-to-Action (CTA) section of your campaign registration. Providing these links ensures faster review and a more streamlined vetting process.

Consent Requirements

During the vetting process, reviewers closely examine the Privacy Policy to confirm compliance with consent standards. The policy must not falsely claim consumer consent for sharing end-user data with third parties for marketing purposes.

Although businesses may share data necessary for operations, do not sell or transfer consumer information (e.g., leads) to third parties for promotional use. Doing so will result in campaign rejection.

To comply with these requirements, include explicit language in the Privacy Policy that states the sender does not share consumer data for non-essential purposes.

Example of Compliant Language:

> **Example:** "Mobile information will not be shared with third parties or affiliates for marketing or promotional purposes. The categories above exclude text messaging originator opt-in data and consent; this information will not be shared with any third parties."

Opt-Out Instructions

Message senders must respect and honor the consumer's right to opt out of a messaging campaign to uphold the integrity of recipient consent. The Privacy Policy must clearly explain how consumers can opt out of future communications.

> **Example:** "If you wish to stop receiving communications, you can opt out by texting STOP, QUIT, END, REVOKE, OPT OUT, CANCEL, or UNSUBSCRIBE."

Guidance for Privacy Policy Development

Bandwidth strongly recommends that each brand create a customized Privacy Policy with SMS-specific disclosures as outlined above. Although Bandwidth does not provide legal advice, message senders and their providers are responsible for ensuring the Privacy Policy complies with TCPA laws and carrier-specific requirements.

For new or non-established brands, various online resources can help develop operational processes and Privacy Policy templates tailored to your business needs.

> **Important:** Even when using third-party resources, ensure your Privacy Policy, practices, and procedures include the required SMS disclosures and opt-out functionality. Failure to meet these standards may result in registration or vetting rejections, such as: "805 - Compliant privacy policy is required on the website."

Terms and Conditions

All message senders must provide compliant Terms and Conditions for their consumers or recipients. This document is a required part of campaign registration. If your brand does not have a website, upload the Terms and Conditions as a PDF during registration.

Required Details:

- **Brand Name:** Clearly identify your brand.
- **Message Types:** Describe the types of messages consumers will receive.
- **Message Frequency Disclosure:** Indicate message frequency (e.g., "Message frequency varies").
- **Message and Data Rates:** Include a disclosure stating, "Message and data rates may apply."
- **Customer Care Contact Information:** Provide support options, such as "Text HELP for help" or "Contact [email address] for support."
- **Opt-Out Instructions:** Specify how to opt out, such as "Text STOP to cancel."

Example Terms and Conditions:

> **Example:** "You agree to receive informational messages (e.g., appointment reminders, account notifications) from [Company Name]. Message frequency varies. Message and data rates may apply. For assistance, reply HELP or email us at [email address]. You can opt out at any time by replying STOP."

For more information, refer to the Five9 10 DLC FAQ and Campaign Registration to learn about the A2P 10DLC Messaging Service.

SMS Opted Numbers

SMS Opted Numbers page keeps track of Customer DID numbers and whether they agree to receive text or social media messages from businesses. Their consent is recorded based on keywords they choose in response to messages, crucial for following regulations and ensuring welcome communications.

By default, Five9 handles common reply messages like STOP or UNSUBSCRIBE for Toll-Free Numbers and 10DLC numbers. It records customer consent, which can be checked and confirmed.

With the Keyword definition feature, users can set up custom keywords in different languages. Admins handle this and configure them for Opt-In or Opt-Out.

This content covers the benefits of managing opt-in/out preferences, including centralized management for admins, compliance with regulations like TCPA and GDPR, improved customer experience, efficient communication, enhanced data security, targeted marketing, and scalability.

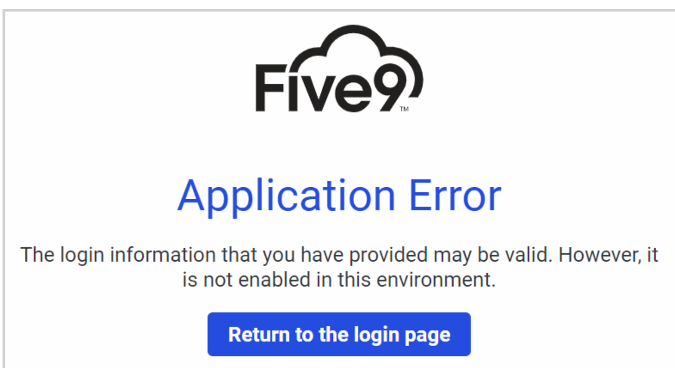
> **Note**
>
> It's essential to adhere to CTIA (Cellular Telecommunications Industry Association) guidelines to avoid serious penalties. Compliance with the CTIA Messaging Principles and Best Practices is mandatory for US organizations, as non-compliance can lead to hefty fines and restrictions on messaging capabilities. Understanding and following these CTIA regulations is essential for smooth, penalty-free communication within the US.

Logging In

You use the Five9 Administrator Console to log into your Five9 account and access SMS Opted Numbers.

1. Enter the URL that applies to your location.
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/
2. Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



> **Note:** If you don't see the SMS Opted Numbers card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

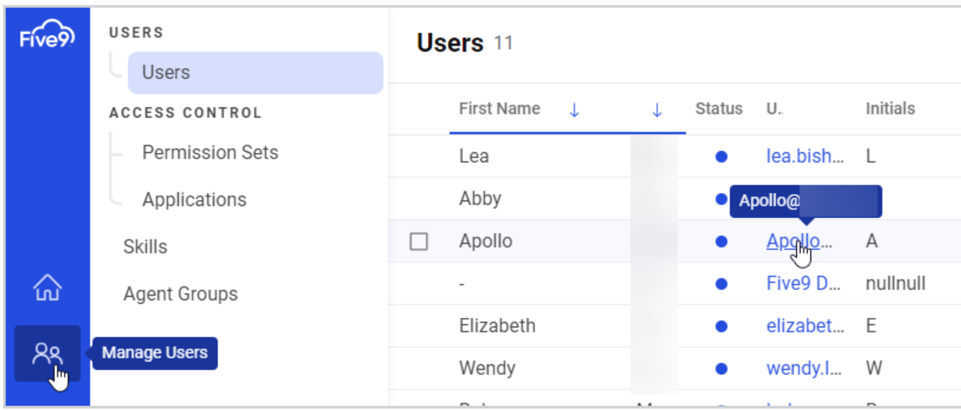
Permissions and Permission Sets

Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view the SMS Opted Numbers card in Admin Console, edit and view Opt-In lists.

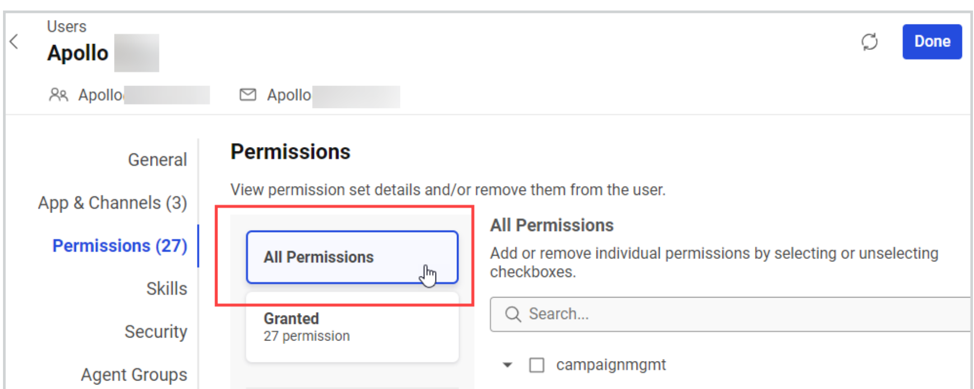
> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

Assigning Permission Sets

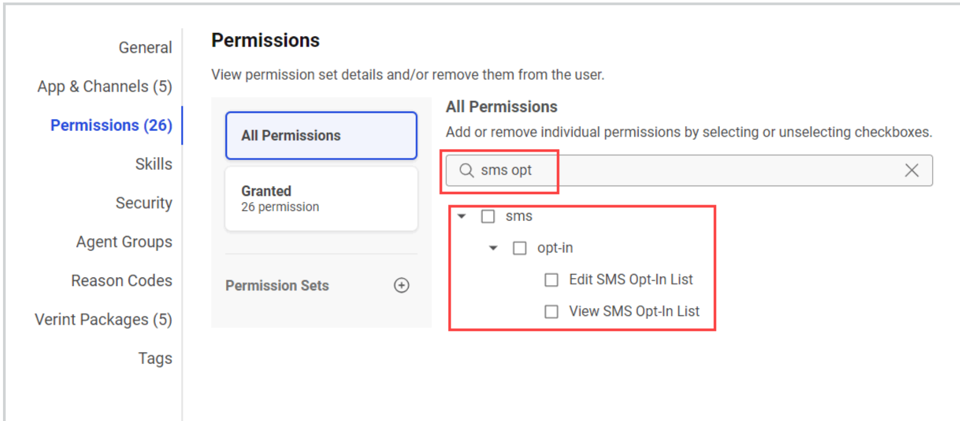
1. Select the user hyperlink on the Users page.



2. Select the **Permissions** tab and select the available permission set for the application.



3. Type the permission group name from the table in [SMS Opted Numbers]() into the search field or scroll the list to the permission group, and select the desired permissions or group.

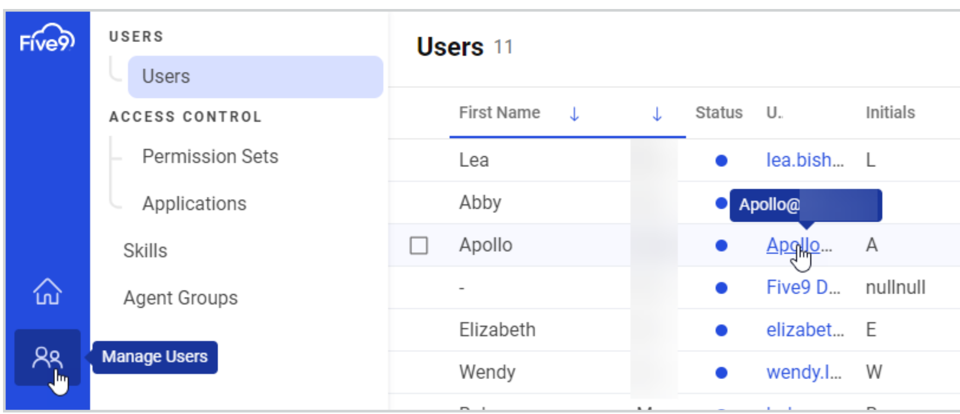


4 Select **Done**.

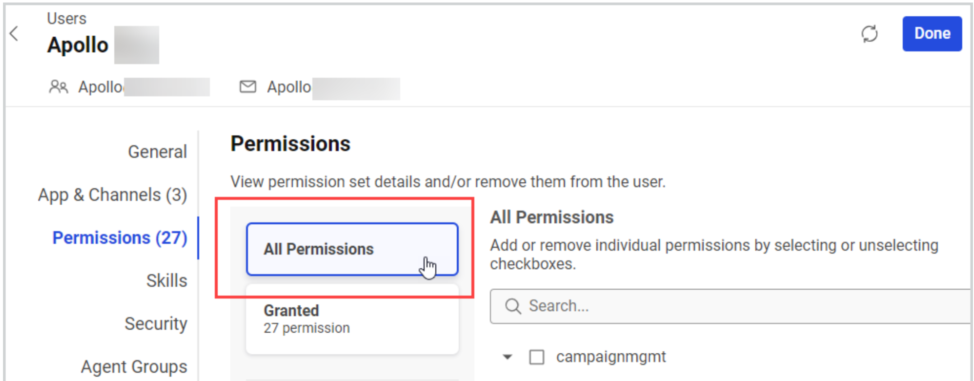
To assign the same permissions to multiple users, create a permission set (see *Permissions and Permission Sets* in the Five9 Admin Console documentation).

Assigning User Permissions

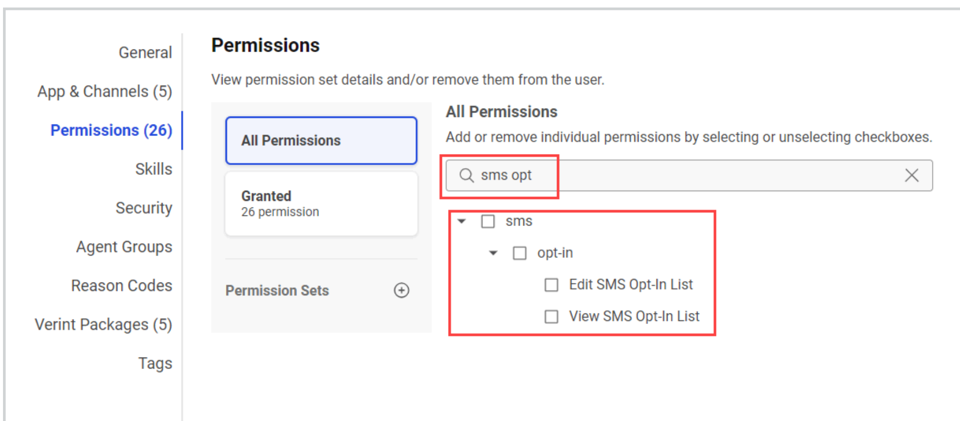
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select **All Permissions**.



3 Type the permission group name from the table in [SMS Opted Numbers Permissions](#) into the search field or scroll the list to the permission group, and select the desired permissions or group.



4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

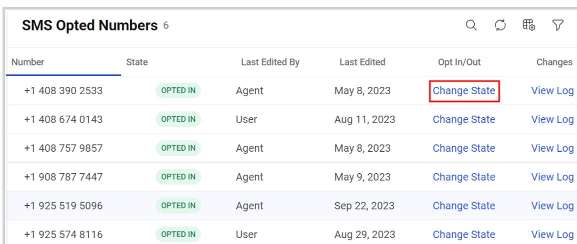
SMS Opted Numbers Permissions

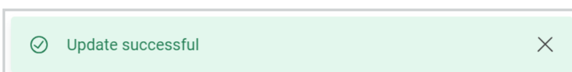
This section presents the individual user permissions required to view the SMS Opted Numbers card on the Admin Console home page and access the described features. The SMS Opted Numbers permissions are:

Group	Subset	Permission	Description
sms	opt-in	Edit SMS Opt-In List.	Allows users to edit the SMS Opt-In List.
	opt-in	View SMS Opt-In List.	Allows users to view the SMS Opt-In List.

Updating Opt-In/Out Status

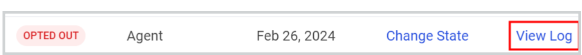
Users with edit permissions can adjust the Opt-In/Out status of the Customer DID. Once the status is updated, they'll receive a confirmation message indicating "Update Successful."





Change History

To see a record of all Opt-In/Out changes for a Customer DID number, users can click on **View Log**.

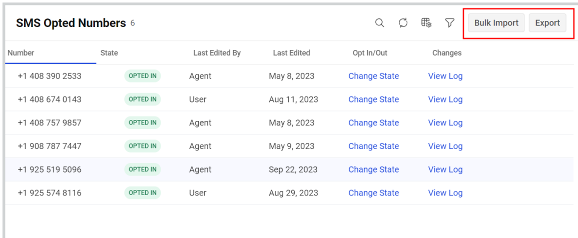


Import and Export of Opt-In/Out Data

On the Opt-In/Out page, users can export and import data.

Export Data

By selecting the **Export** button, users can export data to a CSV file, without any number restrictions.

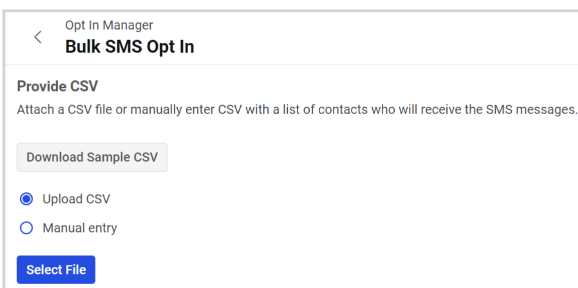


The data is exported into a CSV file.

A	B	C
Number	State	Last Edited
14083902533	OPT_IN	5/8/2023 12:10
14086740143	OPT_IN	8/11/2023 12:33
14087579857	OPT_IN	5/8/2023 10:53
19087877447	OPT_OUT	2/26/2024 8:03
19255195096	OPT_IN	9/22/2023 12:36
19255748116	OPT_IN	8/29/2023 13:27

Import Data

Users can import Opt-In/Out data into the list using an external CSV file. The system offers a sample CSV file as a reference and template.



Users have the option to edit a group of records in a CSV file, and then import the updated file back into the system.

> **Note**
> While there's no cap on the number of records displayed on the Opt-In/Out page, there are limitations on the quantity that can be transferred in or out at once due to pagination constraints and import limits. A maximum of 10,000 records can be imported at a time. It is crucial to

ensure that all phone numbers are formatted according to the E164 standard before import.

SMS Dashboard

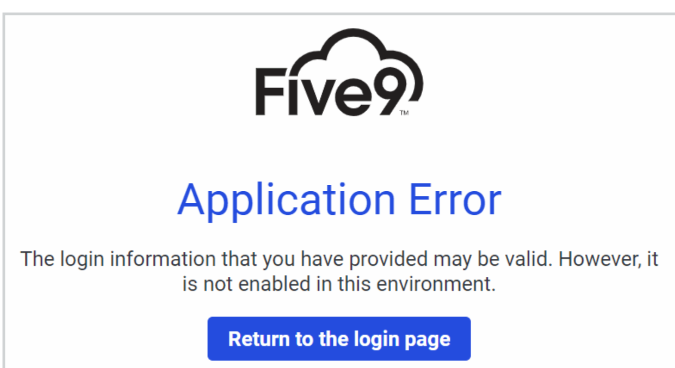
The SMS Dashboard is a centralized platform designed to provide administrators and supervisors with a comprehensive overview of SMS data across different time periods.

Logging In

You use the Five9 Administrator Console to log into your Five9 account and access Agent Assist Studio.

1. Enter the URL that applies to your location.
   - US domains: https://admin.us.five9.net/
   - Canadian domains: https://admin.ca.five9.net/
   - UK domains: https://admin.uk.five9.net/
   - European domains: https://admin.eu.five9.net/
2. Enter your credentials (username and password).

This message indicates that you may have valid credentials to access Admin Console, but may not be enabled for the selected region. Ensure that the region you select represents your contact center locale.



> **Note:** If you don't see the SMS Dashboard card on the Admin Console home page, contact your administrator and ask them to assign the required permissions (see Permissions and Permission Sets).

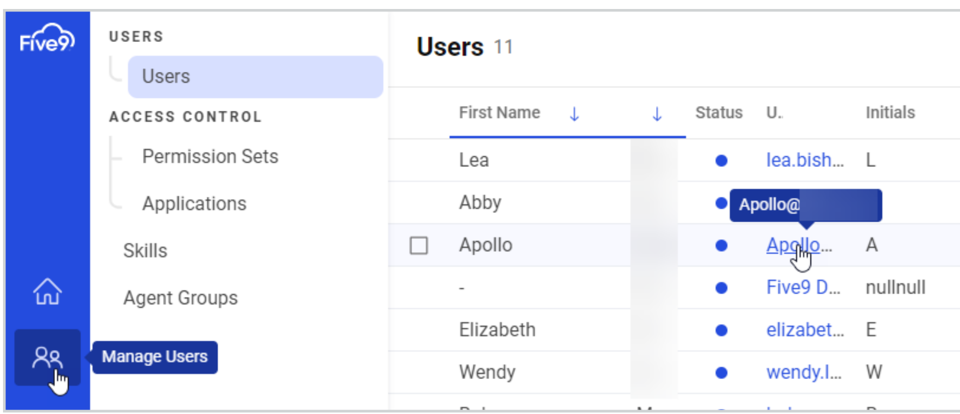
Permissions and Permission Sets

Permissions and permission sets in the Five9 Administrator Console control the features or functions users can perform. This section discusses how to assign the user permissions required to view the SMS Dashboard card in Admin Console.

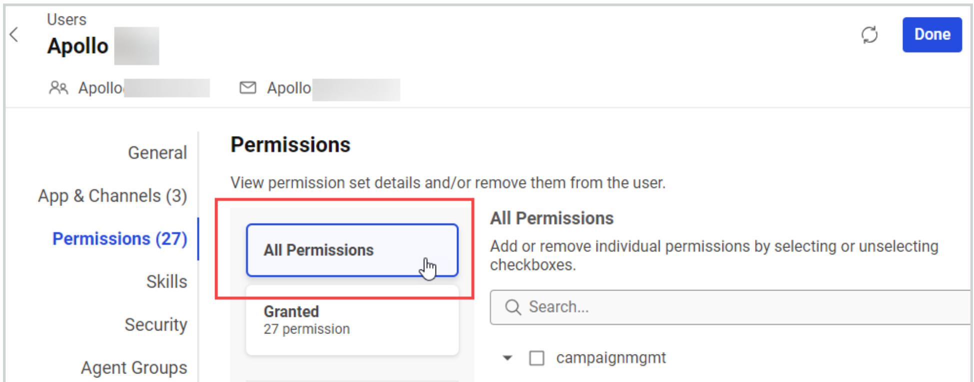
> **Note:** Only admins with permission to create and edit users can assign permissions on the Manage Users page. Contact your administrator to obtain these permissions.

Assigning Permission Sets

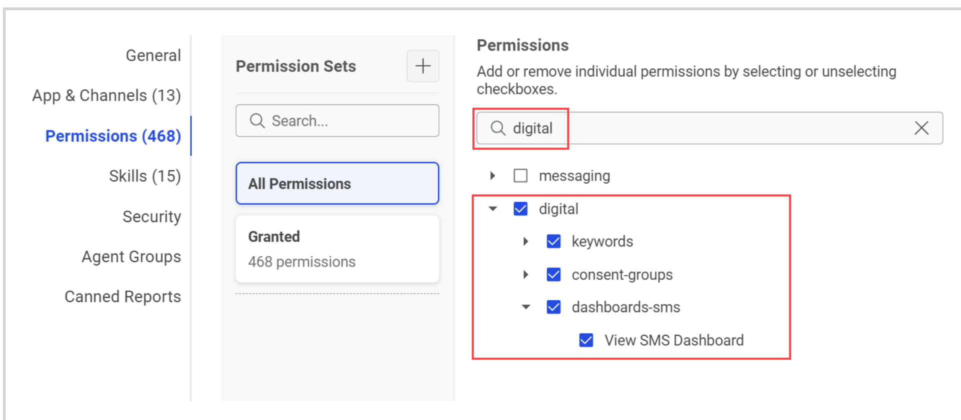
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select **All Permissions**.



3 Type the permission group name from the table in [SMS Dashboard Permissions](#) into the search field or scroll the list to the permission group, and select the desired permissions or group.

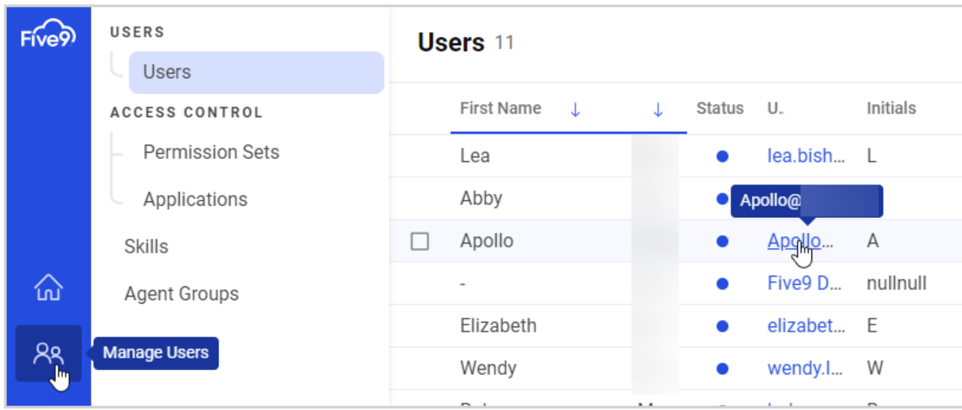


4 Select **Done**.

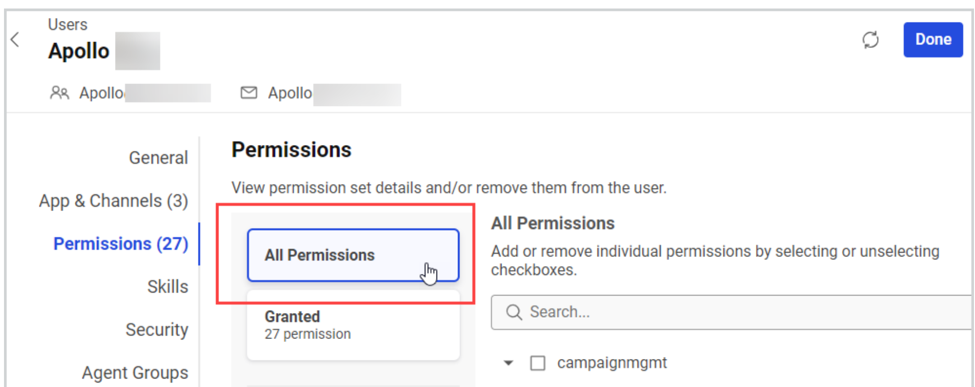
To assign the same permissions to multiple users, create a permission set (see *[Permissions and Permission Sets](#)* in the Five9 Admin Console documentation).

Assigning User Permissions

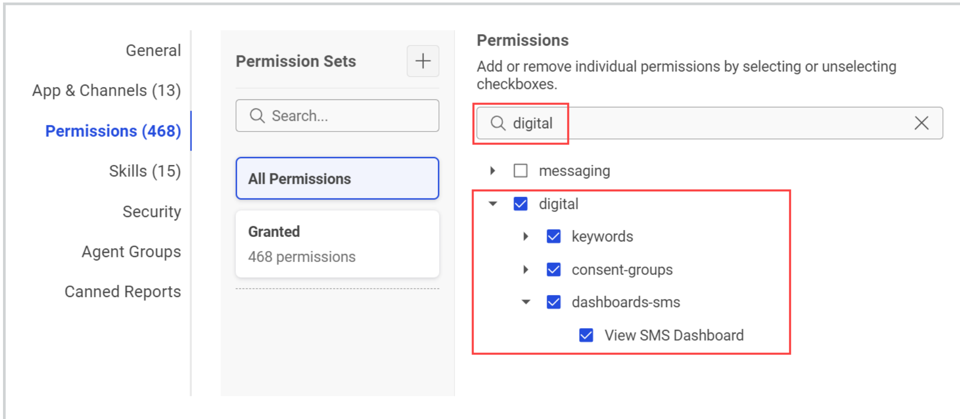
1 Select the user hyperlink on the Users page.



2 Select the **Permissions** tab and select **All Permissions**.



3 Type the permission group name from the table in SMS Dashboard Permissions into the search field or scroll the list to the permission group, and select the desired permissions or group.



4 Select **Done**.

For more information on assigning permissions, see *Permissions and Permission Sets* in the Five9 Admin Console documentation.

SMS Dashboard Permissions

This section presents the individual user permissions required to view the SMS Dashboard card on the Admin Console home page and access the described features. The SMS Dashboard permissions are:

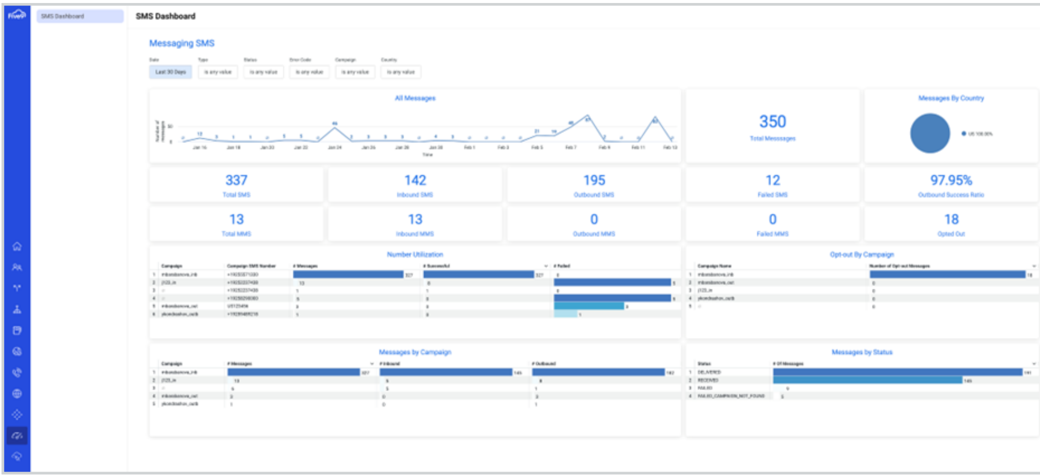
Group	Subset	Permission	Description
digital	dashboard-sms	View SMS Dashboard	To access the Dashboard page, users must have permission to view the SMS Dashboard. Without this permission, users will be unable to see the Dashboard page.

Accessing the SMS Dashboard

All Five9 SMS customers are granted access to the SMS Dashboard, with permissions automatically enabled for their domains. Users can access the Dashboard either through the search button or by navigating to **Operational > SMS Dashboard**.

Note

Five9 does not provide support or documentation for the schemas utilized within this Dashboard. Additionally, we do not endorse or support any modifications to the Looker view or customization of the Dashboard's appearance.



SMS Statistics

Below is the description of the statistics presented in the dashboard.

Statistics	Description
Total Messages	The total number of messages sent and received across the domain. This will include SMS, MMS, Short Code, and Alpha Numeric Messages.
Message by Country	Segment the total messages (SMS, MMS, Short Code, and Alphanumeric) by country.
Total SMS	Determine the total number of SMS messages sent. This count does not include segmentation of SMS messages.
Inbound SMS	Calculate the total number of inbound SMS messages received across all campaigns and associated numbers.
Outbound SMS	Determine the total number of outbound SMS messages sent across the domain, including messages sent from ADP, API calls, and through outbound campaigns.
Failed SMS	The total number of failed SMS messages. Refer to the list of reasons for failed messages for more information.
Outbound	Calculate the ratio of successful outbound messages to unsuccessful

Statistics	Description
Success Ratio	messages. Failure of messages can occur due to various reasons. Consult the list of possible failures.
Total MMS	Determine the total number of inbound and outbound multimedia messages (MMS).
Inbound MMS	Calculate the total number of inbound multimedia messages.
Outbound MMS	Determine the total number of outbound multimedia messages.
Failed MMS	Calculate the total number of failed multimedia messages.
Opted Out	Count the total number of customer responses received with the Opted Out option. Refer to the keyword documentation for definitions of Opt-In and Opt-Out.
Number Utilization by Campaign	The Number Utilization table consolidates key metrics, categorizing them by campaign and associated SMS number. It includes aggregates such as the total number of messages sent, the total number of successful deliveries, and the total number of messages that failed to be delivered.
Opt-out by Campaign	Provide the total number of users opting out by responding to specific keywords. Group the total number by campaigns.
Messages by Campaign	Segmentation of messages (SMS + MMS) by the campaign, listed by the total number of messages, total number of inbound messages, and total number of outbound messages.
Messages by Status	Segmentation of messages by the total number of delivered, the total number of messages received, the total number of messages failed, and the total number of messages with the Failed Campaign Not Found disposition.

Carrier Reported Client Errors

Below is the description of Carrier Reported Client Errors.

Description	Explanation of the Error	Billable
invalid-service-type	The carrier rejected the message due to an invalid service type. This typically means that messaging (SMS or MMS) is not supported by the carrier or handset.	Yes

Description	Explanation of the Error	Billable
destination-service-unavailable	The carrier service is reporting that the destination is not reachable or the SMS service is not available.	Yes
destination-subscriber-unavailable	This error indicates that the subscriber is unavailable. There are several reasons for this, including the subscriber having turned off their handset, the destination being unreachable or barred, the GSM subscriber being busy for outbound SMS, the SIM card being full, voicemail being full, or the inability to reach the destination handset, with the message stored for retry in the Store & Forward function.	Yes
rejected-message-size-limit-exceeded	The downstream vendor cannot retrieve the media as the MMS attachment is too large.	Yes
media-content-invalid	The media content type is not supported. Please review the accepted media types.	Yes
invalid-destination-address	The carrier rejected the message due to an invalid destination address. This could indicate that the number is not in the numbering plan (area code does not exist or the number is invalid) or that the number is not enabled for messaging (such as a landline). Additionally, for toll-free messages to T-Mobile, this could also mean that the user has opted to block all toll-free and short code traffic.	Yes
destination-tn-deactivated	The phone number you are attempting to send to is on the deactivation list. It is not associated with a carrier to receive messages or is inactive.	Yes
no-route-to-destination-carrier	The carrier is reporting that there is no route available for the message. This could be because there is no routing to the destination, no roaming route is available, the destination handset is roaming on a network that cannot be reached, there is no SS7 route, or routing was denied.	Yes
invalid-source-address-address	The carrier is rejecting the message due to an invalid source address - the number does not exist in the numbering plan. Other reasons for this error code include the source carrier being invalid or disabled, the source not being authorized, or the number type not being supported.	Yes

Description	Explanation of the Error	Billable
destination-rejected-message	The destination carrier has rejected the message without providing a specific reason. For AT&T traffic, this could be due to a prepaid user whose account is out of money, a subscriber provisioned to not receive this type of SMS, or the message being identified as spam.	Yes
destination-rejected-message-size-invalid	The carrier has rejected the message because the message length is invalid or too long.	Yes
destination-rejected-malformed	The carrier is rejecting the message because it is malformed. This could be due to various reasons such as a blank message, unacceptable data value, the receiving SMSC or SME not accepting messages with more than 160 characters, syntax error, invalid content, invalid message ID, invalid parameter length, missing expected TLV, invalid TLV value, invalid data coding scheme, invalid number of destinations, error in the optional part of the PDU body, TLV not allowed, or XML validation error.	Yes
destination-rejected-handset	The handset has rejected the message.	Yes
destination-spam-detected	The carrier is reporting this message as blocked for spam. Spam blocks could result from content violations, SHAFT violations (including specific keywords), or originating addresses flagged for repeated spam content.	Yes
rejected-shortened-url	There was an error with the shortened URL used. Aggregator recommends customers obtain their own dedicated domain if shortened links are needed for their messaging campaign.	Yes
rejected-tn-blocked	This error indicates a blocked sender or receiver on the downstream platform. Please contact Aggregator support so we can engage our vendor to determine which telephone number is blocked and why.	Yes
inactive-campaign	The campaign associated with this TN is not active for the destination. Please check the status with TCR (The Campaign Registry). You will receive this error if the campaign is pending or rejected by the DCA or suspended by an MNO but the TN is still assigned to the campaign.	Yes

Description	Explanation of the Error	Billable
provisioning-issue	There is an issue with how the number is provisioned in the industry's database. Some components of 10DLC provisioning may be incorrect or missing. Please contact Aggregator support to investigate and correct this issue.	Yes
destination-rejected-due-to-user-opt-out	The user has opted out of receiving messages from a particular sender. Remove the destination TN from the subscriber list and cease communication with the destination.	Yes
volume-violation-tmo	T-Mobile rejected the message due to a volumetric violation. You have exceeded the daily limit for your 10DLC brand. Please review your brand's daily throughput limit to ensure you are not exceeding the approved volumes.	Yes
volume-violation-att	T&T rejected the message due to a volumetric violation. You have exceeded the rate limit for your 10DLC campaign. Please review your campaign's throughput limit to ensure you are not exceeding the approved volumes. This error can also indicate throttling by AT&T for other reasons, including high spam rates.	Yes
volumetric-violation	The carrier rejected the message due to a volumetric violation. You have exceeded the allotted limit and need to reduce sending. Please retry after some time.	Yes
destination-rejected-sc-not-allowed	The carrier rejected the message due to short code restriction. The destination address is blocked by the mobile operator and cannot receive short code messages, or the mobile operator blocked the destination from receiving messages from this short code for some other reason.	Yes
destination-rejected-campaign-not-allowed	The carrier rejected the message because the short code campaign is not allowed or blocked by the mobile operator.	Yes
destination-rejected-sc-not-provisioned	The short code is not provisioned on the mobile operator's network.	Yes
destination-rejected-sc-expired	The short code has expired with the mobile operator.	Yes

Description	Explanation of the Error	Billable
tfn-not-verified	The message was blocked because the toll-free number is not verified. This could also be due to spam on the unverified TFN. Please review unverified sending limits and submit the TFN for verification as soon as possible.	Yes

Aggregator Service Failure

Below is the description of Aggregator Service Failure messages.

Description	Explanation of the Error	Billable
temporary-app-error	An application within the Aggregator service is experiencing a temporary error, which is preventing the message from being processed.	No
temporary-app-shutdown	The app is currently down. The message was not received. The sender should try sending this message later or to another host.	No
impossible-to-route	It's impossible to route the message, and attempts to deliver through retries have failed.	No
temporary-app-connection-closed	Received a message for a connection that has already been removed.	No
temporary-rout-error-retries-exceeded	The aggregator service expired the message after attempts to deliver through retries failed.	No
temporary-app-error-app-busy	The aggregator service application is temporarily busy and cannot receive messages at this time.	No
temporary-store-error	The message was not received. It cannot be saved to the store.	No
discarded-concatenation-timeout	The aggregator did not receive all parts of the message. Therefore, the message cannot be sent.	No
message-send-failed	The destination carrier has reported a general service failure with sending the message.	No
message-send-failed	The message is unable to be sent because no destination is available.	No
unknown-error	An unknown error was generated by the aggregator when the aggregator core reports an unknown error.	No

Carrier Reported Service Failures

Below is the description of Carrier Reported Service Failures.

Description	Explanation of the Error	Billable
destination-carrier-queue-full	Carrier service is unavailable. This could result from network congestion, a messaging queue full on the vendor side, or a throttling error on the vendor side.	Yes
submit* sm-or-submit* multi-failed	The downstream carrier application is experiencing an error. Submitting the message has failed or canceling the message has failed.	Yes
destination-app-error	The carrier is reporting a general error associated with their application processing the message.	Yes
message-not-acknowledged	NACK - no response or acknowledgment received from the carrier.	Yes
destination-failed	The carrier service is reporting a failure to send to the destination (mobile operator or handset).	Yes

Carrier Errors with Ambiguous Cause

Below is the description of Carrier Errors with Ambiguous Cause.

Description	Explanation of the Error	Billable
delivery-receipt-expired	The aggregator timed out waiting for the delivery receipt. This could be because the downstream provider did not send the requested delivery receipt, or they sent it after the system timed out at two hours.	Yes
unknown-error	The aggregator does not recognize the vendor's error response or does not have the vendor code mapped internally.	Yes

SMS Surcharges

Telecommunication companies in the United States and Canada apply SMS surcharges due to operational, regulatory, and infrastructural factors. Carriers impose these additional costs for sending and receiving text messages to meet specific needs within the telecommunications framework.

Regulatory Environment

The regulatory environment directly drives SMS surcharges in the United States and Canada. In the United States, the Federal Communications Commission (FCC) regulates telecommunications and allows carriers to charge fees to comply with regulations. These fees cover the cost of spam monitoring, network integrity, and security enforcement through systems like STIR/SHAKEN. Similarly, Canadian carriers face regulations that require compliance with strict SMS policies, including spam prevention and pricing structures.

Operational Costs

Operational expenses for maintaining and upgrading network infrastructure contribute to SMS surcharges. Carriers incur costs for customer support, network upgrades, and data management. For example, carriers offset the transition to technologies like 5G by increasing surcharges for services that use existing infrastructure.

Carrier Fees and Interoperability

Carriers impose fees for interoperability between networks, which SMS messages rely on to reach recipients. These fees cover the infrastructure required for transmitting messages across different carrier networks. Carriers also charge surcharges for Application-to-Person (A2P) messaging, where businesses send high volumes of messages that require prioritized routing.

Market Dynamics and Competition

Market competition influences SMS surcharge strategies. Leading carriers such as Verizon, AT&T, Bell, and Telus use surcharges to sustain revenue, fund new technologies, and compete effectively. These fees support carrier investments while enabling them to meet evolving customer demands.

Key Surcharge Components

Carrier-Imposed Fees

- A2P Messaging Fees
    - Carriers charge fees for A2P messaging, which includes business messages for marketing, notifications, and transactions.
    - These fees compensate carriers for the additional infrastructure demands caused by high message volumes.

- Carrier-Specific Costs
    - Carriers like AT&T, Verizon, T-Mobile, Bell, and Rogers impose different surcharges based on their infrastructure and pricing models.

Compliance and Regulations

- 10DLC Registration
    - In the U.S., the 10DLC system allows businesses to send A2P messages using local long codes. Businesses must register their numbers and campaigns with carriers, and the registration fees cover compliance costs.
- Canadian Spam Laws (CASL)
    - Canada enforces anti-spam regulations, requiring businesses to meet compliance standards for SMS, which incur additional costs.

Anti-Spam and Filtering Mechanisms

- Carrier Filters
    - Carriers use advanced filtering systems to prevent spam and fraudulent messages. Surcharges fund these systems to ensure high message quality.
- Verified Sending
    - Surcharges also cover verification processes that authenticate business messages, reducing spam and phishing risks.

Differentiating P2P and A2P Messaging

- Higher Costs for A2P Messaging
    - Person-to-Person (P2P) messages incur lower fees due to their lower infrastructure demands. A2P messages require prioritized routing, resulting in higher surcharges.
- Infrastructure Maintenance
    - Carriers use A2P surcharges to maintain and upgrade SMS infrastructure to ensure reliable delivery for high-volume traffic.

Campaign Management and Monitoring

- Campaign Review
    - Carriers charge fees to review and approve SMS campaigns to ensure compliance with standards.
- Ongoing Monitoring
    - Surcharges fund continuous monitoring of SMS traffic to identify misuse or non-compliance.

Carrier-Specific Surcharges

The following tables list surcharge rates for U.S. and Canadian carriers. These fees include local, toll-free, and short-code messaging and reflect inbound and outbound rates.

Local A2P/10DLC

Carrier	Type	Inbound	Outbound	Start Date
AT&T - Registered	SMS	$0.0030	$0.0030	10/1/2024
AT&T - Registered	MMS	$0.0075	$0.0075	10/1/2024
AT&T - Unregistered	SMS	$0.0100	$0.0100	10/1/2024
AT&T - Unregistered	MMS	$0.0150	$0.0150	10/1/2024
T-Mobile - Registered	SMS	$0.003	$0.0030	6/1/2021
T-Mobile - Registered	MMS	$0.010	$0.0100	6/1/2021
T-Mobile - Unregistered	SMS	$0.011	$0.011	10/1/2024
***New* T-Mobile - Unregistered**	SMS	$0.012	$0.012	12/1/2024
T-Mobile - Unregistered	MMS	$0.02	$0.02	10/1/2024

Carrier	Type	Inbound	Outbound	Start Date
***New* T-Mobile - Unregistered**	MMS	$0.021	$0.021	12/1/2024
TextNow	SMS	$0.00	$0.0020	8/1/2021
TextNow	MMS	$0.00	$0.0020	8/1/2021
US Cellular	SMS	$0.00	$0.0050	3/1/2019
US Cellular	MMS	$0.00	$0.0100	3/1/2021
Verizon - Registered	SMS	$0.00	$0.0030	9/1/2022
Verizon - Unregistered	SMS	$0.00	$0.0100	7/1/2023
Verizon	MMS	$0.00	$0.0050	2/1/2020

Toll-Free

Carrier	Type	Inbound	Outbound	Start Date
AT&T	SMS	$0.0030	$0.0030	10/1/2024
AT&T	MMS	$0.00	$0.0075	10/1/2024
T-Mobile	SMS	$0.00250	$0.0025	9/24/2021
T-Mobile	MMS	$0.0100	$0.0100	9/24/2021
US Cellular	SMS	$0.00	$0.0035	9/24/2021
US Cellular	MMS	$0.00	$0.0100	9/24/2021
Verizon	SMS	$0.00	$0.0030	9/24/2021
Verizon	MMS	$0.00	$0.0050	9/24/2021

Canada: Local

Carrier	Type	Inbound	Outbound	Start Date
Bell & Virgin	SMS	$0.00	$0.0081060	9/1/2023
***New* Bell & Vir-**	SMS	$0.00	$0.008100	11/1/2024

Carrier	Type	Inbound	Outbound	Start Date
gin				
Bell & Virgin	MMS	$0.00	$0.03021169	9/1/2023
***New* Bell & Virgin**	MMS	$0.00	$0.030300	11/1/2024
Eastlink (Bragg Communications)	SMS	$0.00	$0.0058950	9/1/2023
***New* Eastlink (Bragg Communications)**	SMS	$0.00	$0.005900	11/1/2024
Eastlink (Bragg Communications)	MMS	$0.00	$0.0072912	9/1/2023
***New* Eastlink (Bragg Communications)**	MMS	$0.00	$0.007400	11/1/2024
FIDO Solutions	SMS	$0.00	$0.0073690	9/1/2023
***New* FIDO Solutions**	SMS	$0.00	$0.008100	11/1/2024
FIDO Solutions	MMS	$0.00	$0.0147370	9/1/2023
***New* FIDO Solutions**	MMS	$0.00	$0.016300	11/1/2024
Freedom Mobile (Globalive Wireless/WIND)	SMS	$0.00	$0.0066	1/1/2024
***New* Freedom Mobile (Globalive Wireless/WIND)**	SMS	$0.00	$0.006700	11/1/2024
Freedom Mobile (Globalive Wireless/WIND)	MMS	$0.00	$0.0088	1/1/2024
***New* Freedom Mobile (Globalive**	MMS	$0.00	$0.008900	11/1/2024

Carrier	Type	Inbound	Outbound	Start Date
Wireless/WIND)				
Rogers	SMS	$0.00	$0.0073690	9/1/2023
***New* Rogers**	SMS	$0.00	$0.008100	11/1/2024
Rogers	MMS	$0.00	$0.0147370	9/1/2023
***New* Rogers**	MMS	$0.00	$0.016300	11/1/2024
Saskatel	SMS	$0.00	$0.0058950	9/1/2023
***New* Saskatel**	SMS	$0.00	$0.005900	11/1/2024
Saskatel	MMS	$0.00	$0.0058950	9/1/2023
***New* Saskatel**	MMS	$0.00	$0.005900	11/1/2024
Telus	SMS	$0.00	$0.0058950	9/1/2023
***New* Telus**	SMS	$0.00	$0.007400	11/1/2024
Telus	MMS	$0.00	$0.0095790	9/1/2023
***New* Telus**	MMS	$0.00	$0.014800	11/1/2024
Videotron	SMS	$0.00	$0.0066	1/1/2024
***New* Videotron**	SMS	$0.00	$0.006700	11/1/2024
Videotron	MMS	$0.00	$0.0088	1/1/2024
***New* Videotron**	MMS	$0.00	$0.008900	11/1/2024

Canada: Toll-Free

Carrier	Type	Inbound	Outbound	Start Date
Bell & Virgin	SMS	$0.00	$0.008165	9/1/2023
***New* Bell & Virgin**	SMS	$0.00	$0.00810	11/1/2024
Bell & Virgin	MMS	$0.00	$0.030433	9/1/2023
***New* Bell & Virgin**	MMS	$0.00	$0.03030	11/1/2024
Eastlink (Bragg Communications)	SMS	$0.00	$0.007041	9/1/2023
***New* Eastlink**	SMS	$0.00	$0.00590	11/1/2024

Carrier	Type	Inbound	Outbound	Start Date
(Bragg Com-munications)				
Eastlink (Bragg Communications)	MMS	$0.00	$0.007360	9/1/2023
***New* Eastlink (Bragg Com-munications)**	MMS	$0.00	$0.00740	11/1/2024
FIDO Solutions	SMS	$0.00	$0.007422	9/1/2023
***New* FIDO Solutions**	SMS	$0.00	$0.00670	11/1/2024
FIDO Solutions	MMS	$0.00	$0.014846	9/1/2023
***New* FIDO Solutions**	MMS	$0.00	$0.01110	11/1/2024
Freedom Mobile (Globalive Wireless/WIND)	SMS	$0.00	$0.004461	9/1/2023
***New* Freedom Mobile (Globalive Wireless/WIND)**	SMS	$0.00	$0.00440	11/1/2024
Freedom Mobile (Globalive Wireless/WIND)	MMS	$0.00	$0.008907	9/1/2023
***New* Freedom Mobile (Globalive Wireless/WIND)**	MMS	$0.00	$0.00890	11/1/2024
Rogers	SMS	$0.00	$0.007423	9/1/2023
***New* Rogers**	SMS	$0.00	$0.00740	11/1/2024
Rogers	MMS	$0.00	$0.014846	9/1/2023
***New* Rogers**	MMS	$0.00	$0.01480	11/1/2024
Saskatel	SMS	$0.00	$0.005938	9/1/2023
***New* Saskatel**	SMS	$0.00	$0.00590	11/1/2024

Carrier	Type	Inbound	Outbound	Start Date
Saskatel	MMS	$0.00	$0.005938	9/1/2023
***New* Saskatel**	MMS	$0.00	$0.00590	11/1/2024
Telus	SMS	$0.00	$0.004454	9/1/2023
***New* Telus**	SMS	$0.00	$0.00740	11/1/2024
Telus MMS	MMS	$0.00	$0.007423	9/1/2023

Other

Carrier	Type	Inbound	Outbound	Start Date
Claro - PR	SMS	$0.00	$0.0065	7/1/2023
Claro - PR	MMS	$0.00	$0.0150	1/1/2023
Cellular South	SMS	$0.00	$0.0025	9/1/2022
Cellular South	MMS	$0.00	$0.0100	8/1/2022
Digicel Carib-bean	SMS	$0.00	$0.0250	8/1/2022
Reliance Jio Infocom LTD - IN	SMS	$0.00	$0.0530	8/1/2022
Bharti Airtel Limited - IN	SMS	$0.00	$0.0530	8/1/2022
Vodafone Idea Limited - IN	SMS	$0.00	$0.0530	8/1/2022
Telstra Corporation LTD - AU	SMS	$0.00	$0.0790	8/1/2022
Optus Networks Pty LTD - AU	SMS	$0.00	$0.0790	8/1/2022
TPG Telecom	SMS	$0.00	$0.0790	8/1/2022

Carrier	Type	Inbound	Outbound	Start Date
Limited - AU				
Everything Everywhere Limited - UK	SMS	$0.00	$0.0840	8/1/2022
Telefonica O2 UK Limited - UK	SMS	$0.00	$0.0840	8/1/2022
Vodafone UK - UK	SMS	$0.00	$0.0790	8/1/2022

SMS Failed Messages

Below is the description of SMS failed messages.

Description	Explanation of the Error	Billable
Service-not allowed	This error indicates that the service you're trying to use is not permitted. Possible reasons include inaccurate permissions, formatting issues, or the service not being enabled for your use.	No
malformed-invalid-encoding	This message contains invalid characters that are not supported. The aggregator cannot re-encode the message for the destination.	No
malformed-invalid-from-number	The From number associated with the message is not routable to a carrier or valid in the industry. For example, it may be a 9-digit number.	No
malformed-invalid-to-number	The To number associated with the message is not routable to a carrier or valid in the industry. For example, it may be a 9-digit number.	No
malformed-for-destination	The message passed validation during the receive stage but failed during the send stage. This is likely because the destination number (To) is invalid.	No
message-not-sent-expiration-date-passed	The message was not sent because the specified expiration date passed before the message could be sent.	No

Description	Explanation of the Error	Billable
rejected-routing-error	The message cannot be routed within the aggregator, especially when the source and destination are the same number. This could be due to mis-provisioning of the destination (To) number or a configuration issue causing the message to be sent repeatedly between the same numbers.	No
rejected-forbidden-from-number	Messaging from this From number is forbidden, primarily because the number does not belong to BW or the associated account. Other reasons include: the number not being enabled in the Aggregator Dashboard, the account not being enabled for this type of messaging, the number being disconnected, or it being an invalid number (e.g., 11111111111).	No
rejected-forbidden-to-number	Messaging to this To number is forbidden. This could be because the number is not active, not enabled for messaging, or is an invalid number (e.g., 11111111111).	No
rejected-unallocated-from-number	The From telephone number is considered unallocated when it does not exist in our database as an active number. This may occur if the number is not enabled for messaging at the industry level, or if the number has not yet been released in the industry.	No
rejected-unallocated-to-number	The To number associated with this message is a valid North American number but has not yet been assigned to a carrier. As a result, the message cannot be sent downstream.	No
rejected-account-not-defined-from-number	The source account ID is undefined. The From number associated with this message is either not associated with this account, is an invalid number, or is not configured appropriately to send messages.	No
rejected-account-not-defined-to-number	The destination account ID is undefined. The 'To' (destination) number is either not associated with an account, is an invalid number, or is not configured correctly to receive messages.	No
rejected-invalid-from-profile	The aggregator failed to create the destination. This is typically due to the destination profile being invalid, often because the destination number does not support MMS.	No
media-	An error occurred while retrieving the media from the	No

Description	Explanation of the Error	Billable
unavailable	media web server. Please check the media URL and try accessing it directly to see if the media can be fetched successfully.	
rejected-message-size-limit-exceeded	The total size of the MMS message media/attachments exceeded the maximum file size supported.	No
media-content-invalid	The media content type is not supported.	No
rejected-carrier-does-not-exist	The upstream carrier associated with the message does not exist in the aggregator configuration.	No
rejected-forbidden-no-destination	The message cannot be sent downstream because the account associated with the message does not have permission to send to this destination. You may not be provisioned to send to this destination.	No
rejected-forbidden-shortcode	The message cannot be sent because the account associated with it is not provisioned for short code messaging.	No
rejected-forbidden-country	The aggregator system indicates that the account associated with the message is not enabled for messaging in this zone, this country, or this country is outside of messaging reach (specifically for MMS).	No
rejected-forbidden-tollfree	The account associated with this message is not enabled for toll-free messaging.	No
rejected-forbidden-tollfree-for-recipient	Messaging to this toll-free number is not allowed. The number is likely not enabled for messaging or is not active.	No
forbidden-too-many-recipients	The group message has too many recipients. When sending group messages, there's a maximum of 10 participants allowed in a group.	No
rejected-wrong-user-id	The user ID is not valid. Please verify the user ID and retry the message.	No
rejected-wrong-	The specified Application ID is not valid or not associated with the account.	No

Description	Explanation of the Error	Billable
application-id		
rejected-spam-detected	This message has been filtered and blocked by the aggregator for spam. Messages can be blocked for various reasons, including volumetric filtering, content blocking, SHAFT violation, etc.	Yes
rejected-from-number-in-blacklist	The From number has been flagged by the aggregator as prohibited from sending messages. This is typically due to several violations, such as reports of spam or P2P violations, associated with this number by the aggregator or downstream carriers.	No
rejected-to-number-in-blacklist	The number you are attempting to send to is blocked from receiving messages.	No
reject-emergency	Messaging to an emergency number is forbidden.	No
rejected-unauthorized	The aggregator service indicates that the sender is not authorized to send messages from the account.	No

Using the Script Generator

This tool enables you to speed up the creation of the Five9 Chat and Five9 Email Web Forms by generating a basic script that you can customize as needed. However, you cannot add or modify these elements in the forms:

- Variables.
- Five9 information at the bottom of the chat console.

Use the form that corresponds to the location of your domain:

- https://app.five9.com/consoles/Generator/index.html
- https://app.five9.eu/consoles/Generator/index.html
- https://app.ca.five9.com/consoles/Generator/index.html

Generating a Script

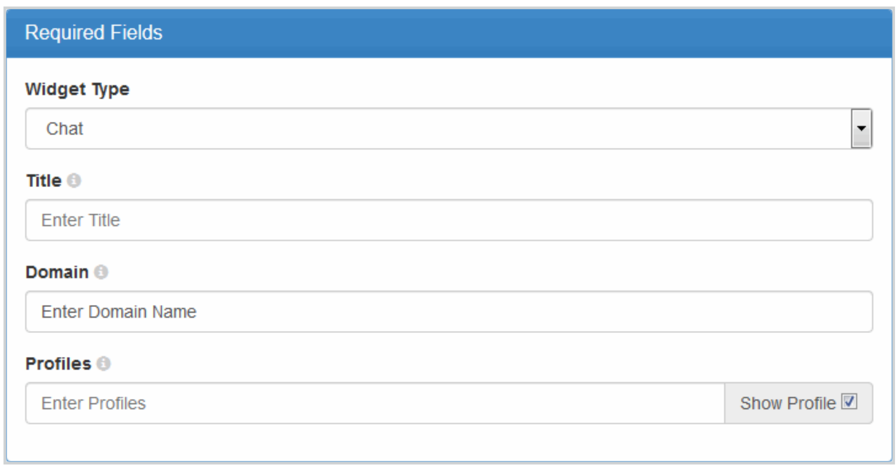
You can generate a script for the chat or proactive chat console. The web forms are similar. The sections below describe the main steps.

When done configuring the form, click **Generate Script**, and customize the results.

Required Fields

Each form contains an identical required fields section.

The bottom row enables you to enter the names of your profiles and to display the names of these profiles to your customers in a menu that may contain names such as Support or Sales. Customers can then select an item for their chat request. If you do not want your customers to see internal profile names, do not enable the option.

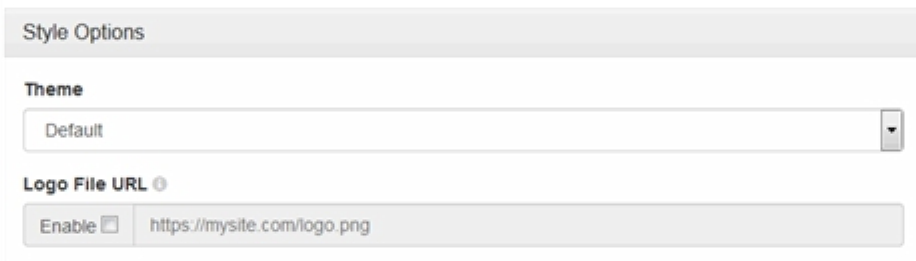


Options

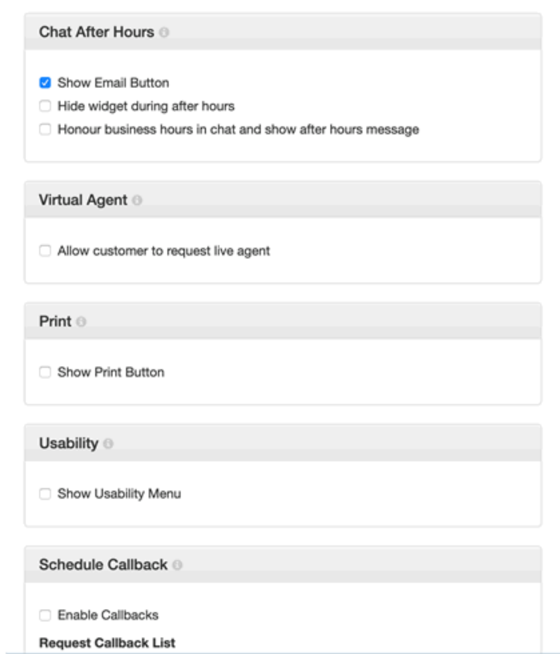
Set or select the options that you want. The fields are different for each type of console.

Chat Console

Select a default or custom style sheet and, optionally, add a custom logo.

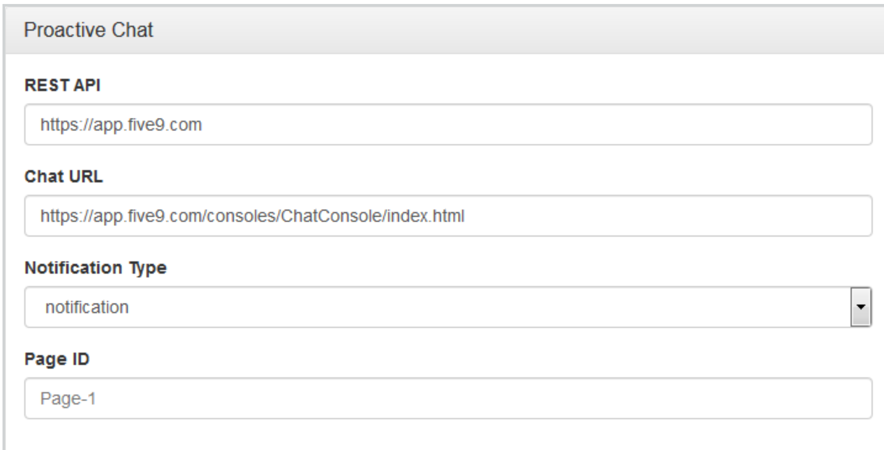


Enable the options that you want.



Proactive Chat

Complete the fields as needed.



Customizing the Results

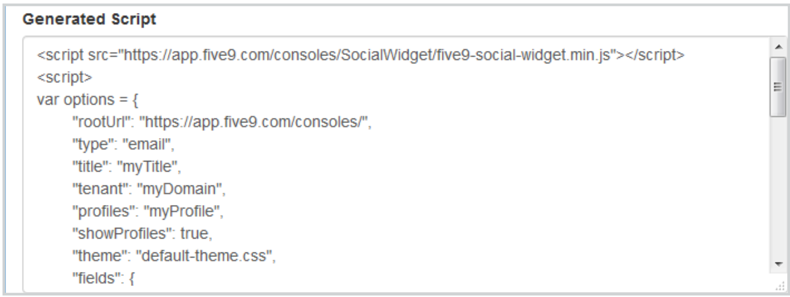
Your script is displayed as a browser string at the top.

You can copy the string, which contains all the parameters and fields that you have configured to a text editor, for example:

```
https://app.five9.com/consoles/EmailConsole/index.html?title=myTitle&
tenant=myDomain&profiles=myProfile&showProfiles=true&theme=default-
theme.css&fields%5Bname%5D%5Bvalue%5D=&fields%5Bname%5D%5Bshow%5D=tru
e&fields%5Bname%5D%5Blabel%5D=whoAmI&fields%5Bemail%5D%5Bvalue%5D=&fi
elds%5Bemail%5D%5Bshow%5D=true&fields%5Bemail%5D%5Blabel%5D=Email&fie
lds%5Bsubject%5D%5Bvalue%5D=&fields%5Bsubject%5D%5Bshow%5D=true&field
s%5Bsubject%5D%5Blabel%5D=
```

Customizing the Script

If you want to customize your script manually, paste it in a text editor.



Previewing the Console

As you work, you can test your changes with the preview buttons.

Email Interactions

> **Important**
> Five9 does not recommend sending shared attachments with personally identifiable information (PII) data. Any attachment with PII should be attached directly to only one contact. If you choose to send an attachment with PII data to multiple users, the compliance responsibility for the California Consumer Privacy Act (CaCPA) and the General Data Protection Regulation (GDPR) is your responsibility to address. Five9 will only purge attachments that are related to a single user. If you use an attachment to send to multiple users when we purge for one of the users then that shared attachment will also be purged.

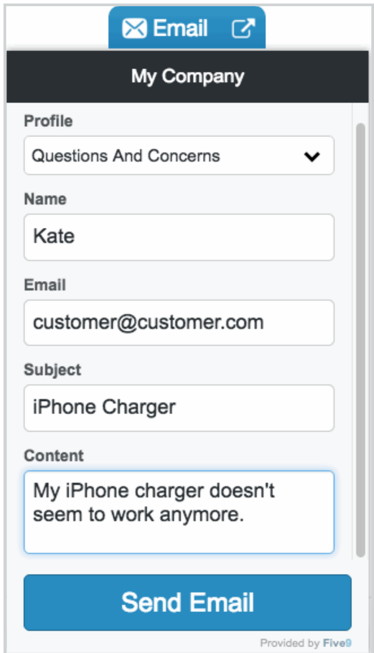
For information about customizing the email console, see **Customizing the Email Console**.

Overview of Email

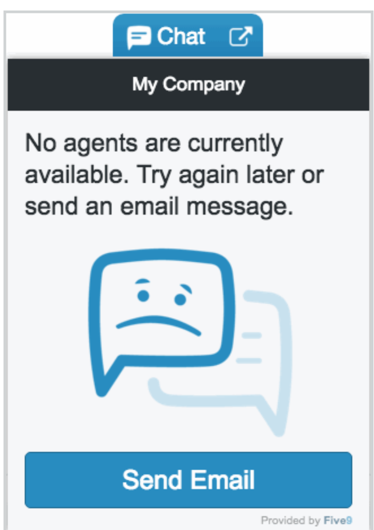
This section describes the email console.

Email Console

The Email Console enables your customers to send an email by using a simple form. In this figure, the customer selected a type of issue and completed the form so that an agent can later help her.



You can offer an email option to your customers when no agents are available. To enable your customers to send an email when no chat agents are available. To add a **Send Email** button, see .



Audience

This chapter is intended for web developers who understand these technologies:

- REST API architecture
- HTTP, HTTPS, and WebSocket protocols
- JavaScript, JSON, and jQuery
- HTML5 and CSS

Survey Console

The Five9 consoles enable the Survey Console so that your customers provide feedback about their experience before leaving your web site.

Configuring Email Interactions

When customers send email messages, they click a link in your corporate Web site. You define the email account to direct incoming email messages for the profile. The fields for incoming and outgoing email accounts may differ.

For information about customizing the email console, see **Customizing the Email Console**.

Important
Agent Desktop Plus and the Five9 CRM adapters support inbound email attachments of up to 25 MB. However, in Microsoft Outlook the email message itself is about 2.5 MB, so with Microsoft Outlook the effective maximum attachment size is 22.5 MB. Outbound email interaction attachments are limited to 10MB in size and have no file type constraints.

Preparing Your Environment

Five9 supports POP3 and IMAP connectivity protocols. You can use accounts that allow direct access from an on-premise exchange email account or Office 365 without enabling using the IMAP and SMTP protocols. Follow these recommendations:

- If your mail server is behind a firewall, always obtain OWA or other access to test a mail client and connectivity to target accounts.
- If you want to use a cloud-based mail provider to forward and/or redirect email to your on-premise mail server, ensure that the intended email address remains intact when an external recipient attempts to reply to an email sent by an agent.

All inbound emailis deleted from your email server's inbox once email is enabled for Five9. To keep a copy of these email interactions, enable **Save Original Inbound Email** (see **Save Original Inbound Email: Creates a new folder to store a copy of processed emails.**).

Important
Before configuring email, create a contact field labeled `email` and of data type Email.

Email Signature

Email Signature by Campaign allows customers to maintain brand alignment and consistency across all outbound email communication. Administrators can define signatures at the campaign level, ensuring:

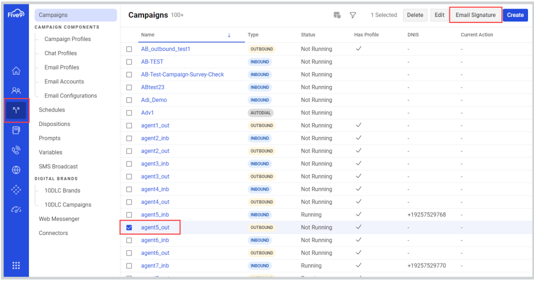
- Brand alignment and consistency are maintained.
- Promotions can be easily added to campaigns, facilitating connections for sales, customer service, and more.

The signature specified for a campaign will be automatically included in every new and outbound email. Agents can view the campaign signature, but they cannot edit or remove it.

Updating the Email Signature

1 Select **Manage Campaigns** and then the campaign.

2 Select **Email Signature**.



3 Upload your email signature and select **Save**.

> **Note**
> The system scans inline campaign signature content for unsafe HTML and malware

> **Note:** The signature can include branding, promotions, contact information, links, images, and text. A campaign signature may contain up to 5300 characters, plus up to 16 attachments.

To remove the email signature, select the **Remove Signature** button at the bottom of the window.

Previewing Email Signatures

Your administrator can configure an email signature for each campaign. If a signature is defined at the campaign level, it appears below the personal signature when a new outbound email or reply is delivered to the recipient. It doesn't appear in the email editor. The signature can include, for example, branding, promotions, contact information, links, images, and text.

If a signature is defined for a campaign, you can preview it when composing an outbound email. To preview the signature, click **Campaign Signature** at the bottom of the email page.

Park Email

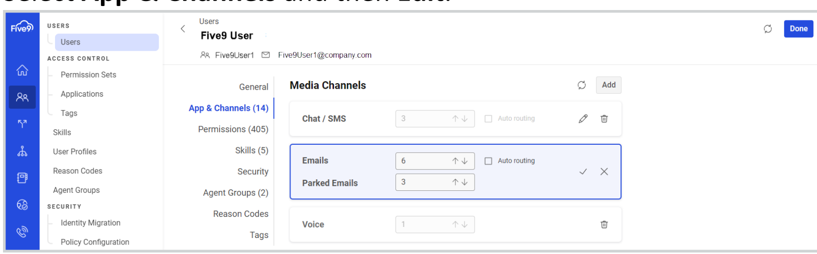
This feature allows agents to park email interactions while they are waiting for additional information, or are otherwise unable to respond to the email interactions immediately. Parked email interactions do not count toward an agent's email capacity. Being able to park emails, allows agents to work full capacity on other email interactions.

You can allow agents to park email interactions for a specific or unlimited duration. If the park duration expires, the agent receives a notification within the agent application. This notification allows them to unpark the email interaction or take other actions as needed. It is essential for the agent to manage their capacity before they can proceed with unparking or any related tasks.

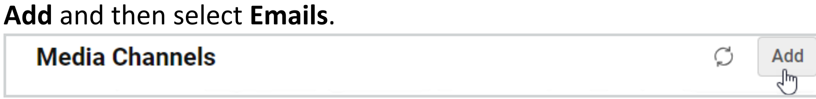
Configuring Parked Email Interaction Limits

1. Select **Users** and then select the user's name.

2. Select **App & Channels** and then **Edit**.



If you do not see **Emails** and **Parked Emails** listed under **Media Channels**, select **Add** and then select **Emails**.



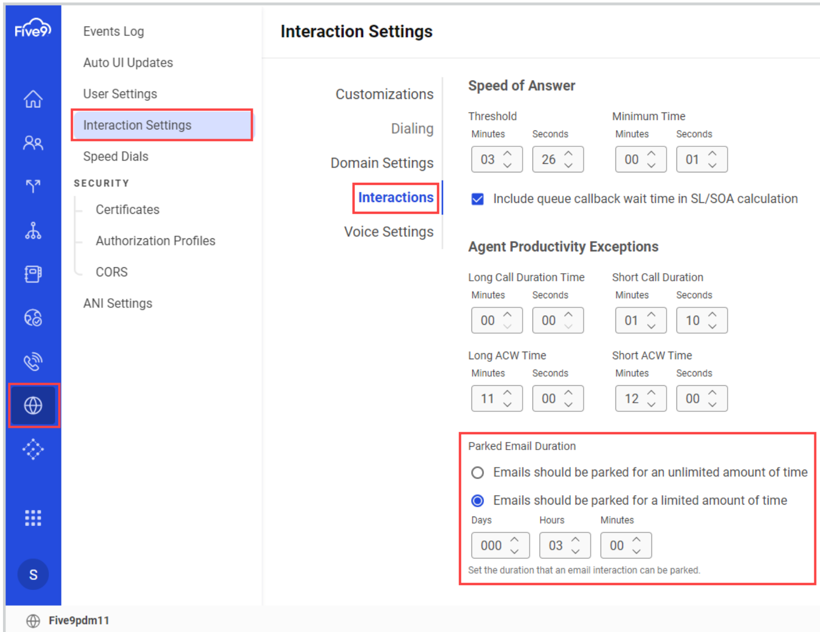
3. Use the up and down arrows in **Parked Emails** to specify the number of email interactions you want the user to be able to park. The capacity of **Parked Emails** cannot exceed the number of **Emails**.

Important

For email parking to function properly, it's essential to define open dispositions for the campaign in the Admin Console.

Configuring the Parked Email Interaction Duration Per Domain

1. Parked email duration can be configured for all campaigns in the domain under **Manage Environment** > **Interaction Settings** > **Interactions**.



2 To allow users to park email interactions with no limit on duration, select **Emails should be parked for an unlimited amount of time**. If you want to set a limit on the duration, select **Emails should be parked for a limited amount of time**, then specify the desired duration in days, hours, and minutes using the up and down arrows. By default, the timer for email parking is set not to expire. Administrators must actively set a duration if they wish for email parking to have an expiration.

Note

Park duration settings apply to all campaigns for the domain.

3 Select **Save**.

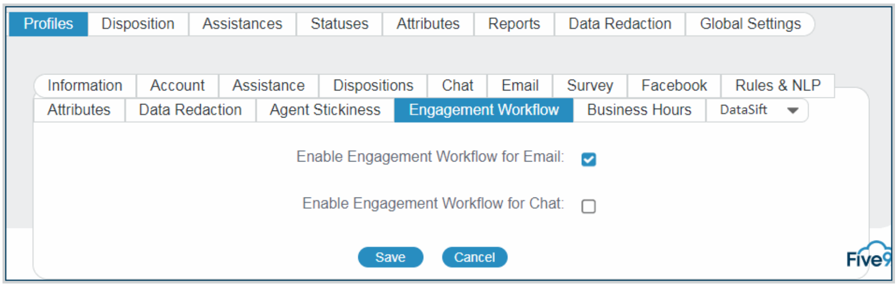
Inbound Email Requirements

This section describes the Five9 inbound email requirements.

Email Proxy

Five9 receives inbound email interactions from external email servers and subsequently routes these interactions through the agent console or through Five9 Engagement Workflow.

Note
Five9 software does not support TLS1.1 for customer chat and email services. If the customer server supports both TLS 1.1 and TLS 1.2, TLS 1.2 will be used.



Email Console

The Five9 email console is a web UI that can be used after business hours when chat is deactivated and generates an inbound email for a specified profile.

Email Console Enablement

The Five9 email console is disabled for a profile under these conditions:

- The account is disabled.
- The email account is deleted.

Email Proxy Enablement

The email proxy is disabled for a profile for these conditions:

- The profile is deleted.
- Enable Email is disabled.
- The profile's email tab connection is not fully configured.

Receiving Inbound Email Interactions

The following rules apply to inbound email interactions received by Five9.

Redaction

See **Configuring Data Redaction Rules** for more information. These regular expressions are used to mask characters in the subject and body of the email that match these regular expressions. Changes in your redaction rules are queried every 30 seconds.

Supported Email Attachment Types

Five9 supports the following attachment types for inbound email interactions to Agent Desktop Plus and CRM agents:

3GA, 3GP, AI, AMR, AVI, BMP, BZ2, CAD, CSS, CSV, DIB, DG, DOC, DOCX, DST, DT, DWG, EMB, EML, EMZ, EPS, FLAC, FLV, GIF, GZ, HEIC, HEIF, HTM, HTML, ICO, JFIF, JPE, JPG, JPEG, JS, JSON, M1A, M1V, M2A, M4A, M4B, M4P, M4R, M4V, MOV, MP1, MP2, MP3, MP4, MPA, MPEG, MPG, MPV, MSG, ODT, OGA, OGG, OGM, OGV, OGX, PDF, PJPEG, PNG, PPT, PPTX, PRC, QT, RTF, SMIL, SPX, SVG, TAR, TIF, TIFF, TXT, VCARD, VCF, WAP, WAV, WEBM, WEBP, WMV, XLS, XLSB, XLSM, XLSX, XML and ZIP.

No restrictions exist for outbound email attachment types.

Email Proxy From External Email Servers

Messages are received in batches up to 100 and are repeated until all emails are consumed, this does not wait for 30-second intervals.

Routing Email Interactions Using Engagement Workflow

Five9 Engagement Workflow can help to determine if an email is spam and automatically set a disposition the interaction without routing to an agent. You can use attributes or custom call variables to store email interaction header information and use Five9 Engagement Workflow to parse the headers and determine actions and routing for the email.

Routing or Segmentation Use Cases. Determine if the incoming email is a new interaction or a reply to an existing email thread. Within the email replies, determine which email thread this response references and route the email or apply actions using the Five9 Rules Engine.

Routing Replies to Marketing Campaigns. You can route email replies to support cases separately from email interactions that are replies to marketing campaigns. Use the reply-to field to identify the previous reply by an agent in the Five9 Rules Engine and expose this new rule to route the email to a skill or agent.

For more information about using the Five9 Rules Engine, see Configuring Your Five9 Rules.

Saving Original Inbound Messages

When the Five9 email proxy polls an account email a new folder is automatically created This folder, `Five9Processed_<CampaignName>`, receives a copy of each email interaction. This process ensures that a copy of each email retained for future reference after emails are processed and deleted. You can control this setting in your SCC Administrator console. See Save Original Inbound Email for more information.

Note

The POP3 protocol does not support saving processed or unprocessed messages.

If Five9 cannot process an email, it will either keep the email in the inbox for a later retry or move it to the `Five9Processed_<CampaignName>` folder.

As an alternative to using the Save Original Inbound Email feature, or if you choose to continue using POP3 protocol, to retain the original email messages, create a rule to copy and move to a backup location all email from the account connected to the profile. For instructions about creating the rule, refer to your email server documentation and consult your IT administrator.

Creating Email Accounts

You can create accounts for Microsoft and other exchanges in the Email option of your profile.

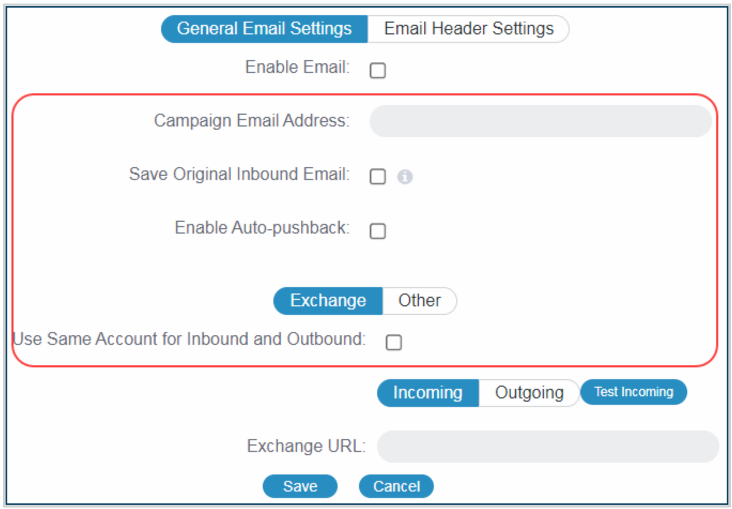
Gmail Account

New Gmail accounts use basic authentication and require additional configuration for Five9 to pull email interactions from your Gmail account. To complete your Gmail configuration, see sign in with app passwords.

Google may require an additional step when signing into a new application. If you receive an email from Google about a critical security alert, see unblock Five9 from consuming email from your Gmail account.

All Email Accounts

1 For all types of accounts, complete these fields as needed:



- **Enable Email**: Enables the email account.
- **Campaign Email Address**: The address used for agent email replies in this format: *email-account-name@domain.type*

  > **Example:** support@five9.com

  The account email address used to authenticate the email proxy is used when this field is not specified.

  > **Important:** This email address is used to synchronize contact information. This field must match a custom contact field in the VCC administrator application and should not be reassigned or re-created once in place.

- **Save Original Inbound Email**: Creates a new folder to store a copy of processed emails.
  - Disabled (default): No additional folders are created and emails are deleted after processing.
  - Enabled: Five9 creates a folder, Five9Processed_<ProfileName>, to store a copy of processed email interactions.

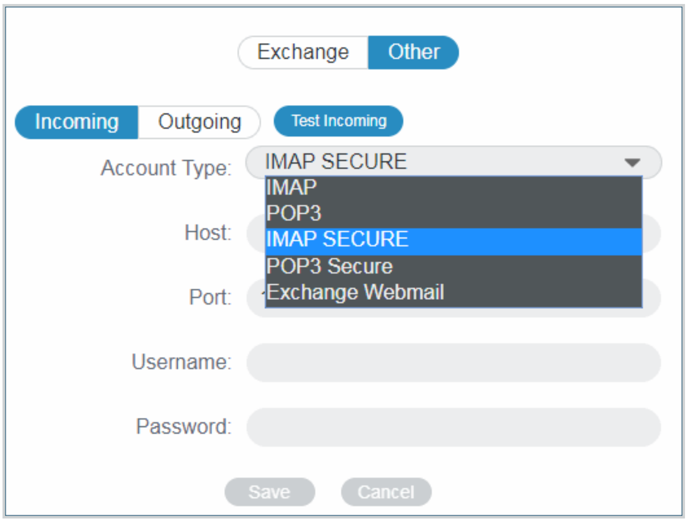
- **Enable Auto-pushback**: Returns email interactions to the queue so that the interactions are reassigned if the agent who owns the interaction has not responded after the time specified in the **Auto-pushback Interval** field below.
- **Auto-pushback for Logged-In Users**: Controls whether email interactions are returned to the queue for reassignment to other agents:
  - Disabled: Interactions are returned to the queue only if the agent is logged out. In this case, the timer starts when the agent who owns the interaction logs out. If the agent logs back in before the allowed time expires, interactions are not returned to the queue.
  - Enabled: Interactions are returned to the queue whether or not the agent is logged in. In this case, the timer starts when the agent locks the interaction.
- **Auto-pushback Interval**:

  Displayed when **Enable Auto-pushback** or **Auto-pushback for Logged-In Users** is enabled. Time when email interactions are returned to the queue if the agent who owns the interaction has not responded. Applies only the first time after the interaction is locked.

1. Select your exchange option.
   - **Exchange or Other**: Whether to connect directly to the Microsoft Exchange or other type of server. When you select **Other**, two options **Incoming** and **Outgoing,** are displayed.
2. Select your Incoming and Outgoing email servers.
   - **Use Same Account for Inbound and Outbound**:
     - Selected: The same email account will be used for both inbound and outbound email interactions.
     - Deselected: Enables you to specify distinct account for incoming and outgoing email interactions.
3. Complete the appropriate section:
   - Microsoft Exchange (see **Microsoft Exchange** in Creating Email Accounts)
   - Other Email Account Types (see **Other Email Account Types** in Creating Email Accounts)

Microsoft Exchange

Complete the fields as needed.



Field	Description
Use Same Account for Inbound and Outbound	Enabled by default. If you disable this option, as shown above, you may send email from an account other than your inbound account. In this case, email is created and stored in an outbound email account. **Example:** Your customer receives email from `customer_support@<company>.com`. However, when you create an outbound account, the customer receives email from `test.five9@<company>.com`.
Test Exchange Test Incoming Test Outgoing	Tests the connection, username, and password. The button that is displayed depends on the type of account that you are creating.
Exchange URL Incoming Exchange URL Outgoing Exchange URL	URL of your exchange server in the appropriate format. Automatic URL discovery is not supported. **Exchange URL**: • Web Outlook: https://mail.***<yourDomain>***.com/owa • Exchange Web Services: https://mail.***<yourDomain>***/EWS/Exchange.asmx

Field	Description

	Incoming Exchange URL: Same as Exchange URL above.
	Outgoing Exchange URL:
	`https://`***`my.exchange.server`***`/EWS/Exchange.asmx`
	Example:
	`https://outlook.office365.com/EWS/Exchange.asmx`
	`https://mail.infodev.net/EWS/Exchange.asmx`

Exchange Username Outgoing Exchange Username	User name for the Microsoft Exchange email account in this format: `emailAccountName@enterprise.type` **Example:** `support@`***`<yourDomain>`***`.com`
Exchange Password Outgoing Exchange Password	Password for the Microsoft Exchange email account receiving the email.

If you use Outlook Exchange, a **Five9 Manual** folder is automatically created to store messages that are malformed or contain bad header information, which the Five9 email proxy is unable to process. The URL for this folder contains the server address followed by `/EWS/Exchange.asmx`.

Example

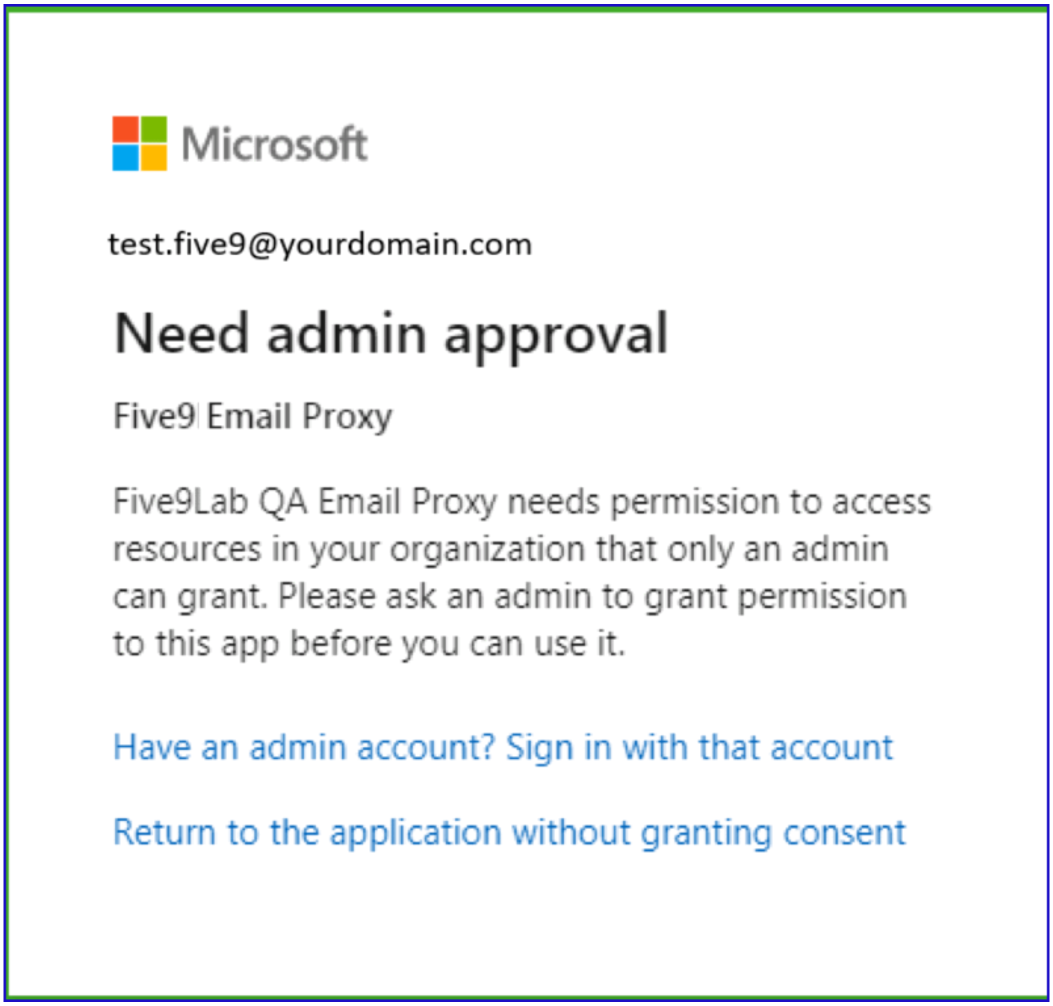
`https://mail.`***`<yourDomain>`***`.com/EWS/Exchange.asmx`

To ensure that the mail administrator can monitor this folder when items are delivered, Five9 recommends that you create an alert in your mail server. These malformed messages must be processed manually.

Configuring OAuth2 for Office 365 Exchange Server

Microsoft is ending support for Basic authorization for Office 365 Exchange Server. Therefore, if you have accounts that use basic authorization, you are required to upgrade to OAuth2. If you select the POPS, IMAPS, or Exchange protocol and Office 365 Exchange Server, you can assign OAuth2 authentication for email interactions.

If Azure AD tenant administrator has disabled ability to consent to applications accessing company data for the organization users, user will see the following screen after authentication when trying to add token:



In this instance, your domain administrator must provide admin consent for Five9 application before you will be able to configure OAuth2. To grant corporate consent for OAuth2 configuration, you must have administrative consent from a global administrator, application administrator, or cloud application administrator.

Granting Administrator Consent

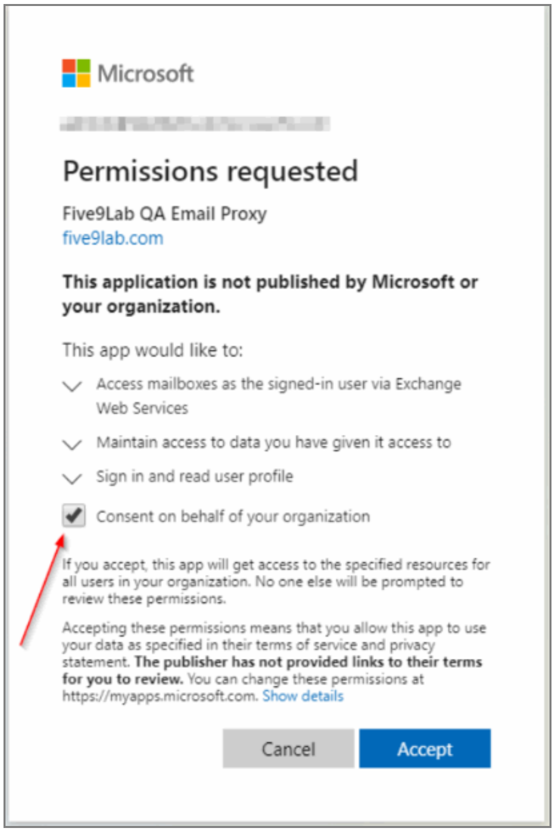
You have three options for consent.

Sign in Using Administrator Credentials

To obtain administrator consent using administrator credentials, follow these steps.

1 Click **Have an admin account? Sign in with that account** and sign in using domain administrator credentials.

2 After authentication, you must select **Consent on behalf of your organization**, shown below.



Important

Ensure that you are authorized to access the correct account for your business. When generating a token, the default for Microsoft O365 is your current logged-in account. The messages from the current account will be downloaded in Five9. Five9 encourages you to match credentials for Campaign Email Address and OAuth2 configuration AD administrator.

Authenticate Using Administrator Consent

To authenticate using administrator consent, follow these steps.

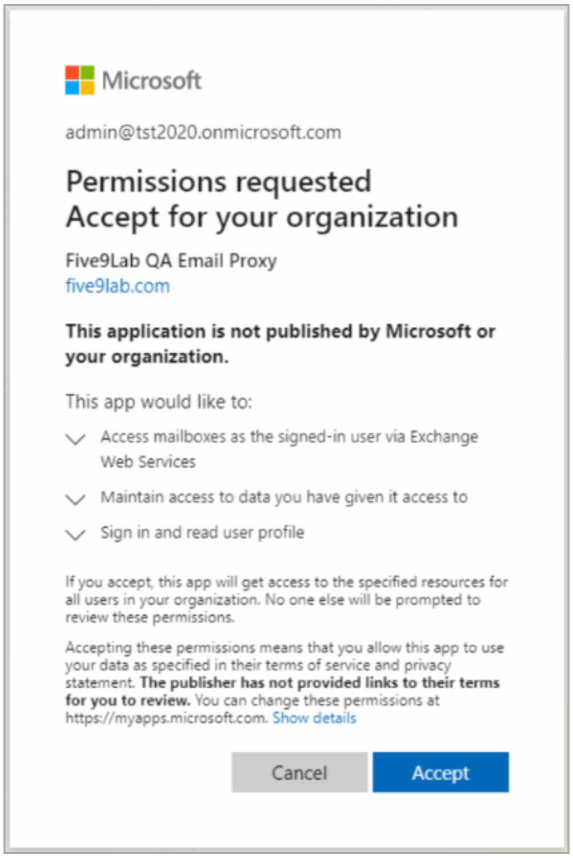
1 Share the appropriate admin consent screen link with tenant administrator, based on your location:

location	URL
US	https://login.microsoftonline.com/common/adminconsent?client_id=628fc081-b066-4302-9878-69974e6bb61e
CA	https://login.microsoftonline.com/common/adminconsent?client_id=628fc081-b066-4302-9878-69974e6bb61e
EU	https://login.microsoftonline.com/common/adminconsent?client_id=f24962af-4f46-494f-a64d-344361177216
UK	https://login.microsoftonline.com/common/adminconsent?client_id=f24962af-4f46-494f-a64d-344361177216

Note

You must replace <**us_client_id**> and <**eu_client_id**> with the actual Five9 application IDs.

2 When opened, you will be prompted for authentication and consent. Click **Accept**.



Once consent has been granted, you may start adding tokens.

Authenticate Using Powershell and Azure AD

To obtain administrator consent using PowerShell and Azure AD, connect to Azure AD in PowerShell and then create new service principal by issuing one of the following commands, based on your location:

Five9.com:

```
New-AzureADServicePrincipal -AppId <us_client_id>
```

or

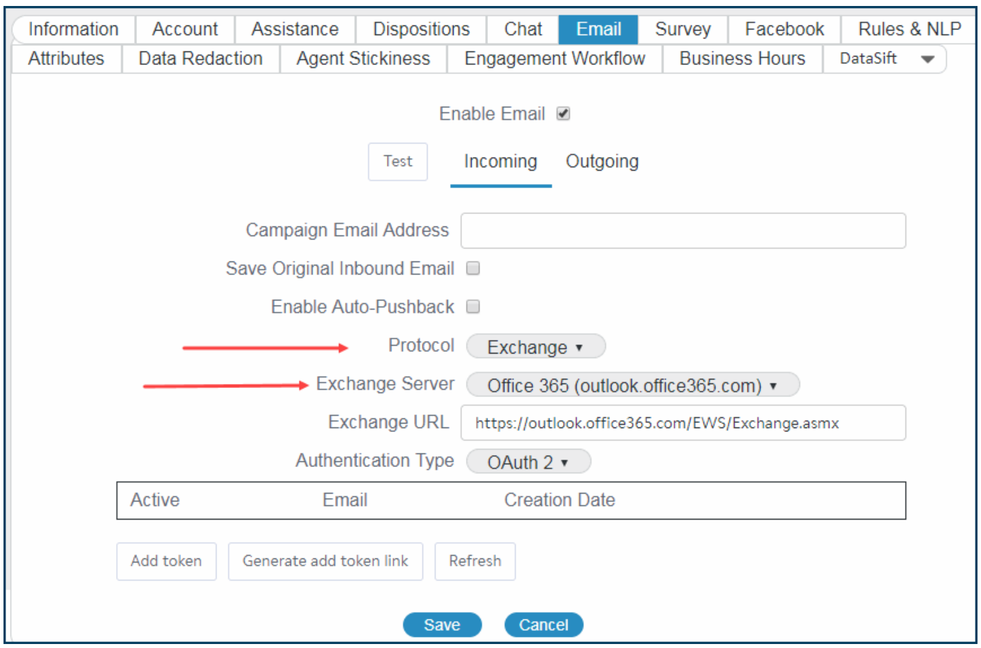
Five9.eu:

```
New-AzureADServicePrincipal -AppId <eu_client_id>
```

> **Note**
> You must replace <**us_client_id**> and <**eu_client_id**> with the actual Five9 application IDs.

After service principal has been created, open Azure AD administration screen, go to enterprise applications and search for Five9 applications. Click the application name, then **Permissions**. Once selected, click **Grant consent for** <application>, then click **Accept**. Refresh the permissions screen to verify that permissions have been granted. You may start adding tokens.

Enabling Authentication in SCC Admin



To enable OAuth2 authentication, follow these steps.

1. Select your email profile in the SCC administrator console.
2. Select a protocol. OAuth2 is supported in POPS, IMAPS, and Exchange.
3. Confirm that **OAuth2** is selected as your Authorization type.
4. If you are not the account owner, proceed to step 9.
5. To add a token, click **Add token**.

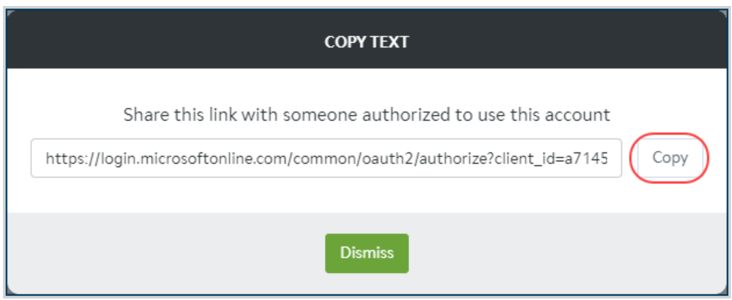
6 Follow the instructions to log into your Microsoft Exchange account.

This window closes once authentication is verified.

7 Proceed to step 11.

8 If you are not the account owner, click **Generate add token link**.

This button generates a link that you can send to the account owner to grant OAuth2 access to your Office 365 Exchange instance.



9 Send the generated link to the Office365 Exchange account owner to grant aOAuth2 access to your Office 365 Exchange instance.

Once accepted, the OAuth2 token appears in your token list. You can refresh the list to see any updates.

10 Select the authenticated token from your token list.

If this is your first authorization token, it is selected automatically.

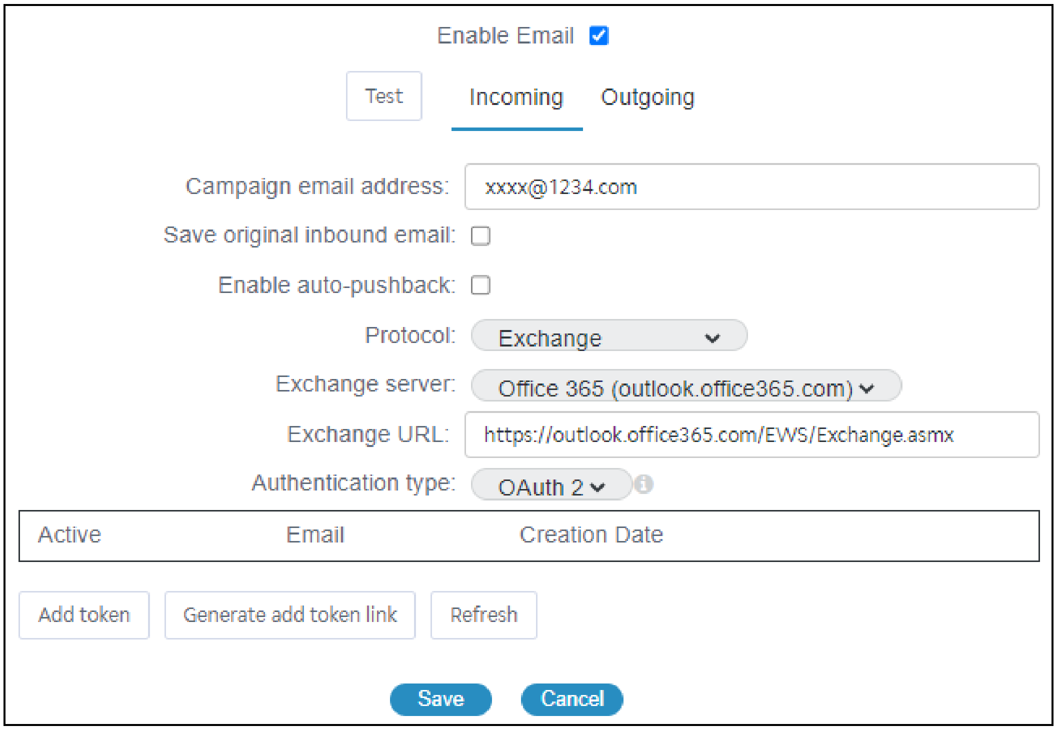
11 To verify that your OAuth2 setup is complete, click **Test**.

Note

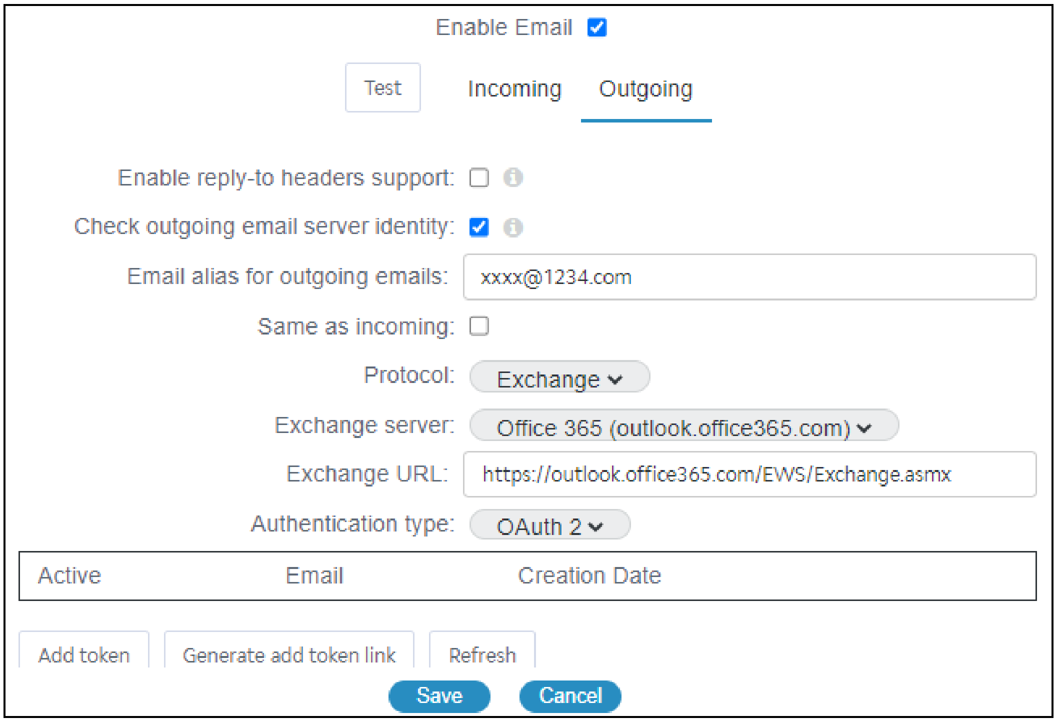
Five9 recommends to connect Exchange Online with Exchange protocol, although it is possible to connect with IMAPS or POP3S protocols and Oauth2 authentication type.

Other Email Account Types

Select **Incoming** and complete the fields as needed. The image shows Exchange selected as Protocol:



Select **Outgoing** and complete the fields as needed. The image shows Exchange selected as Protocol:



This table describes the possible options:

Field	Description
Test Incoming Test Outgoing	Tests the proxy connection that validates the user name, password, connection, and host settings.
Account Type	Possible types of incoming account: IMAP, POP3, IMAP secure, POP3 secure, Exchange, and Exchange Webmail.
Host Outgoing Host	Host name of the incoming or outgoing mail server. Format: *mail.enterprise.type* Example: mail.company.com
Port Outgoing Port	Default port: • Incoming mail: 110 • Outgoing email: 25
Username Outgoing Username	User name for the incoming or outgoing email account in this format: `emailAccountName@enterprise.type` **Example:** five9.support@five9.com

Field	Description
Password Outgoing Password	Password for the incoming or outgoing email account.

Troubleshooting Email Activity

If email interactions are not pulled from your mailbox by Five9, test the connection.

1 Log in to the SCC Administrator, and navigate to **Profiles > Email**.

2 Click **Test.**

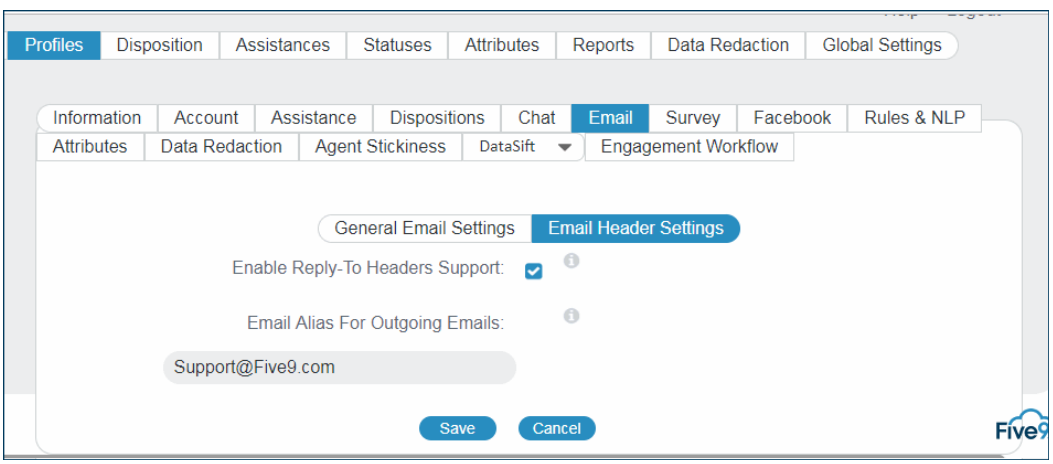
This test validates that Five9 can connect to your email account.

Important

If the password in your email account changes in the future, you must also update your password in this console.

Configuring Email Header

To configure your email header, click **Email Header Settings** in the Email tab.



Option	Description
Enable Reply-	Enabled: Uses the reply-to email address defined in the email

Option	Description
To Headers Support	header as the contact record for the interaction and for agent email replies. Disabled: Uses the Inbound email address as the contact record for the interaction and for agent email replies.
Email Alias for Outgoing Email	Address to be used when the customer replies to email messages. **Example:** Customer receives an email from Support@gmail.com, the email reply from the customer sent to Support@Five9.com.

Saving Original Inbound Messages

When the Five9 email proxy polls an account email a new folder is automatically created This folder, `Five9Processed_<CampaignName>`, receives a copy of each email interaction. This process ensures that a copy of each email retained for future reference after emails are processed and deleted. You can control this setting in your SCC Administrator console. See Save Original Inbound Email for more information.

Note

The POP3 protocol does not support saving processed or unprocessed messages.

If Five9 cannot process an email, it will either keep the email in the inbox for a later retry or move it to the `Five9Processed_<CampaignName>` folder.

As an alternative to using the Save Original Inbound Email feature, or if you choose to continue using POP3 protocol, to retain the original email messages, create a rule to copy and move to a backup location all email from the account connected to the profile. For instructions about creating the rule, refer to your email server documentation and consult your IT administrator.

Customizing the Email Console

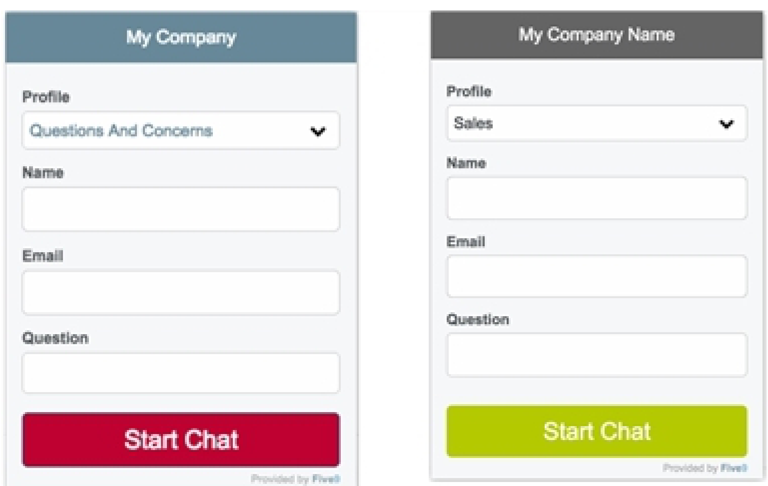
The Five9 Email Console enables you to offer email conversations to your customers.

Choosing Your Email Console Theme

You may define your either a default or a custom theme with a CSS. The Five9 default CSS is located at `https://app.five9.com/consoles/Common/css/themes/default-theme.css`.

- Predefined Themes: The themes are located in the console application: `default`, `flagship` (left), and `lime-time` (right). The themes use neutral colors that are suitable for many web sites. The main differences are in the colors of the header and the button. Enter the name of the theme in the `theme` property when creating the social widget, for example:

```
Five9 SocialWidget.addWidget({
    theme: 'lime-time.css',
    ...
```



- Custom Theme

  You can customize every aspect of the console by using a custom style sheet. To do so, enter the URL of your file.

```
Five9 SocialWidget.addWidget({
    theme: 'https://<my-web-site>/css/<my-custom-theme.css>',
     ...
```

Managing Browser Notifications for Agents

This chapter applies to users of Five9 Chat, Email, and Social in Agent Desktop Plus. If you manually choose your interactions (*cherry pick*), by default you see and hear notifications in your browser when new interactions are routed to your station if your application is not in focus.

If you prefer to block Five9 notifications, follow these steps for your browser.

> **Important**
> If you do so, all browser notifications, including those for new calls, are disabled when your application is not in focus.

Firefox
Chrome
Internet Explorer

Firefox

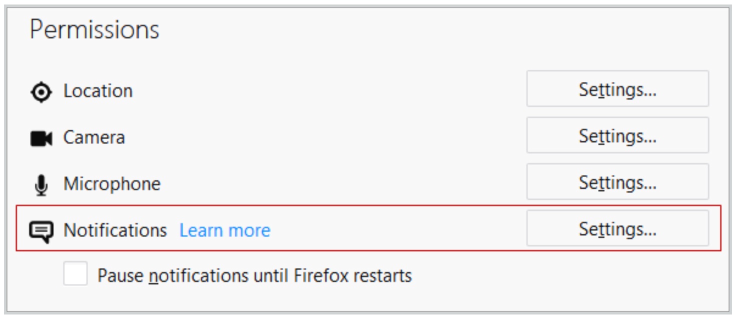
This section applies to users of Five9 Chat, Email, and Social in Agent Desktop Plus. If you manually choose your interactions, by default you see and hear notifications in your browser when new interactions are routed to your station if Agent Desktop Plus is not in focus.

To block Five9 notifications, follow these steps.

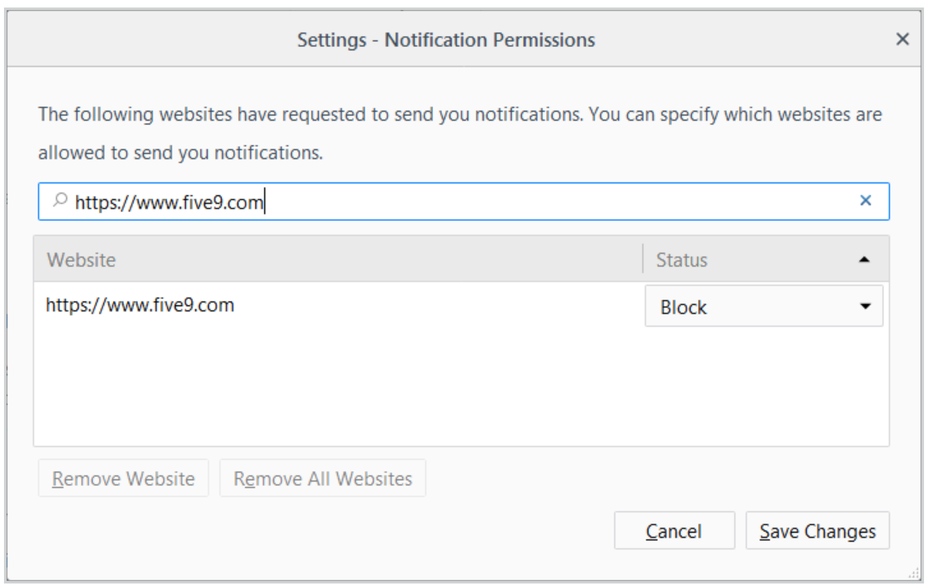
> **Important**
> If you do so, all browser notifications, including those for new calls, are disabled when your application is not in focus.

1 In the address bar, enter `about:preferences#privacy`.

2 Scroll down to **Permissions**, and click **Settings**.

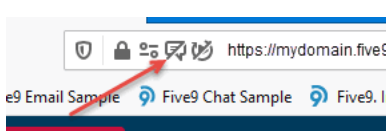


3 In the search field, enter **https://www.five9.com** and select **Block**.



4 Click **Save Changes**.

When notifications are blocked in Firefox in Windows, a speech bubble icon appears in the address bar. You can click this icon to change the settings.



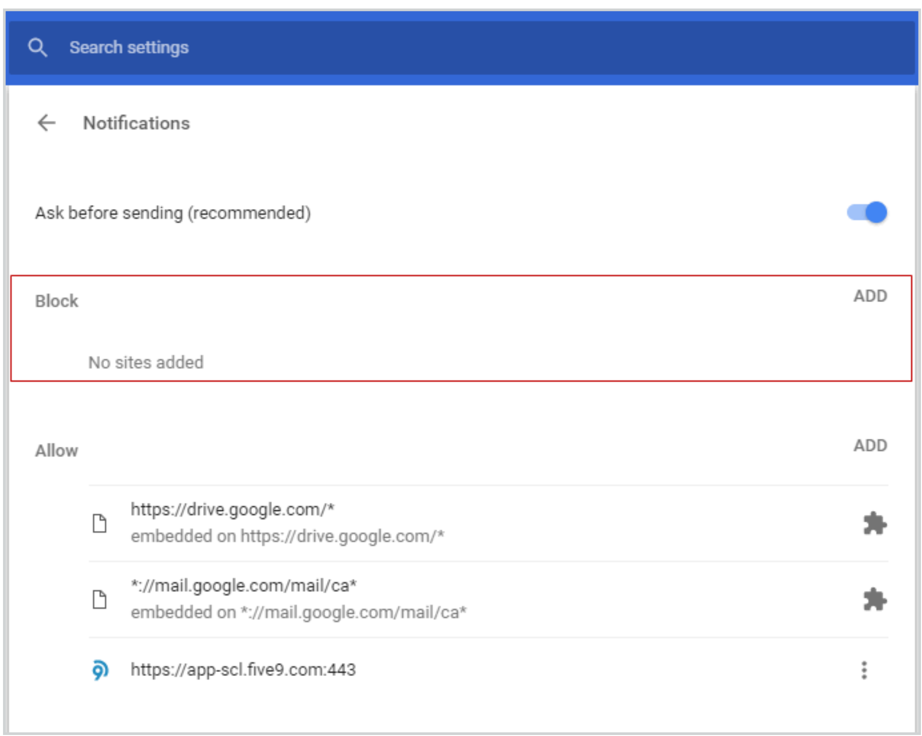
Chrome

This section applies to users of Five9 Chat, Email, and Social in Agent Desktop Plus. If you manually choose your interactions, by default you see and hear notifications in your browser when new interactions are routed to your station if Agent Desktop Plus is not in focus.

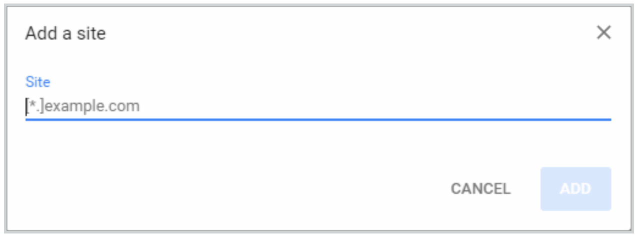
To block Five9 notifications, follow these steps.

Important
If you do so, all browser notifications, including those for new calls, are disabled when your application is not in focus.

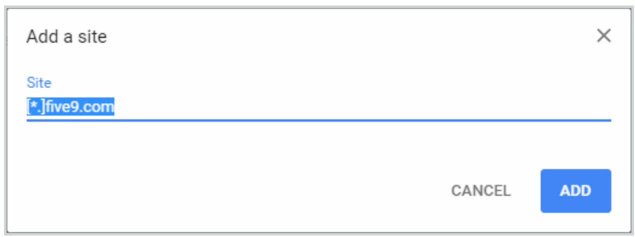
1 In your browser, paste **chrome://settings/content/notifications**.



2 Click **Add**.



3 Enter `[*.]five9.com`, and click **Add**.



Internet Explorer

This section applies to users of Five9 Chat, Email, and Social. If you manually choose your interactions, by default you see and hear notifications in your browser when new interactions are routed to your station if Agent Desktop Plus is not in focus. You cannot block Five9 notifications.